Meridian Knowledge Solutions, Inc.

Knowledge Centre™ 4.1 Baseline Documentation

Part 2 — User's Guide

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2. Users Guide

Welcome to the Meridian KSI Knowledge Centre™ Users Guide. This document is tailored for the average end user of the site. It discusses the functionality within the site and describes how users take courses, find desired content, and interact with fellow employees.

2.1. Audience

This document is intended for end users of the site. Functionality described herein is available to all site users. The scope of this document is a detailed explanation of buildings and the functions found within those buildings and on the toolbars. Access to restricted functionality, such as content administration, is described in the Content Administrators Guide; site administration functions are described in the Site Administrators Guide.

2.2. Site Access

Each time you access the site you are prompted to provide a login ID and password that you determine at registration on your first visit to the site. During registration, you also create your user profile that is used for tracking your learning and knowledge sharing activities. The profile you create is used to control and adapt your experience at the site. This includes access rights as well as tracking accomplishments and community participation.

2.2.1. Registration

As mentioned above, the first time you come to the site, you should select the Register link from the top of the page. During registration, you can create a Login and Password, create your profile, and select your organization within the company.

To ***Begin*** registration, perform the following steps:

1. Click Register link or icon.
2. Complete the Register Form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Login ID	Enter text for your Login ID. Your login must contain at least four letters or numbers and **Cannot** contain characters such as /, @, or &.
*Password	Enter text for your Password. Your password must contain at least four letters or numbers and **Cannot** contain characters such as /, @, or &.
*Confirm Password	Enter the exact text you entered for Password.
*Alternate Password (i.e., Mother's Maiden Name)	Enter text for your alternate password. Your alternate password must contain at least four letters or numbers and **Cannot** contain characters such as /, @, or &.
*Confirm Alternate	Enter the exact text you entered for your alternate password.

Password	

Note: *You must use your Login ID and Password each time you enter the site.*

3. Click Submit. The Select Organization page displays.
4. Select an organization from the top drop-down list box.
5. Click Expand to view sub-organizations within the selected organization. Repeat until you have found your organization. The message “No sub-organizations exist within this organization” displays as appropriate.
6. Click Select to choose the current organization. The User Profile page displays.
7. If your organization is not available via these menus, perform the following steps:
8. In the Other Organization text box, type the name of your organization.
9. Click Submit to choose the other organization. The User Profile page displays.
10. Create your profile by typing your information into the form. *All required fields are marked with an *asterisk.*
11. Check Send me updates and notification of content changes at this email address if you would like to receive updates periodically.
12. Check Make this information available to others in the User Directory if you would like other users to view your contact information.
13. Click Submit to complete your registration. A verification page displays with a link to the Campus Map. Click Reset to clear the information in all fields.

2.2.2. Login

To ***Login***, perform the following steps:

1. Complete the Login information, entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*Login ID	Enter your Login ID. This is the Login ID you chose when you first registered in the site. You can change your ID and Password at any time once you have entered the site. See Update Profile for details about changing your Login ID and Password.
*Password	Enter password. This is the Password you chose when you first registered in the site. See Update Profile for details about changing your ID and Password.

2. Click Submit. After successful login, you are taken to the site map.

Note: Each time you return to the site, you are presented with a Login screen.

2.2.3. Forgot Login?

If you have ***forgotten your Login ID***, perform the following steps:

1. Click **Forgot Login?**. A Login Assistance form displays.

2. Complete the form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*First Name	Enter your first name as you did when you first registered in the site.
*Last Name	Enter your last name as you did when you first registered in the site.

Your Login ID is returned in a confirmation page. Make note of your Login ID.

3. Click Next. This returns you to the Login screen.
4. Enter your Login ID and Password.
5. Click Submit. After successful login, the home page displays.

Note: *You also have the following options:*

- You may also re-register by choosing Register from the navigation menu. If you choose this option, you will lose any special access privileges you may have received under your previous Login ID and will not have documentation for any accomplished training.

If your Login ID is not listed after entering your first and last name:

1. Confirm that you have entered the information as you did during registration;
2. Click the email link to contact your site administrator for additional assistance.

2.2.4. Forgot Password

If you have ***forgotten your Password***, perform the following steps:

1. Click **Forgot Password?**. A Password Assistance form displays.
2. Complete the form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*Login ID	Enter your Login ID. This is the Login ID you chose when you first registered in the site. You can change your ID and Password at any time once you have entered the site. See Student Profile for details about changing your ID and Password.
*Email Address	Enter your Email Address. This is the email address you entered when you first registered in the site.

3. Click Submit. Your password is sent to the email address that you entered during registration.
4. After receiving your password, login to the site as described above.

2.2.5. Tour

The Tour provides a brief overview of the Knowledge Center organized by building. It presents an overview of buildings and the functions within them.

To ***Access*** the Tour function, perform the following steps:

1. Click **Tour**. This opens a new window.
2. Click **Start Tour**.
3. Use the **Previous** and **Next** links at the bottom of each page to navigate through the tour.

2.3. Top Toolbar

At the top of the Site screen is the Top Toolbar. This toolbar contains graphic links to functions that are frequently used. No matter where you are in the site, the toolbar and these functions are available.

To ***Access*** any one of these functions, perform the following steps:

1. Move cursor over the graphic icon. The active icon changes color.
2. Click the icon.

The Top Toolbar also contains a drop-down list box that enables you to jump directly to a function without having to go through the building interface.

Figure 2-1 Top Toolbar

Figure 2-2 Top Toolbar Enabled for Web Accessibility

To ***Select*** a function, perform the following steps:

3. Click the down-arrow to activate the box.
4. Click to select the desired function.
5. Click  . ***Note**: This step exists for sites enabled for Web Accessibility. If a Go button is not visible, the selected function automatically appears.*

2.3.1. Info

Clicking the Info icon displays an information page about the administrators of the Site, including contact information.

2.3.2. Home

Clicking the Home icon displays the Campus Map. As mentioned earlier, the site is built around the graphical metaphor of a campus map. This intuitive approach provides ease of navigation and access to various resources located within the separate buildings. You can return to the Campus Map any time from any where in the site by clicking this link.

2.3.2.1. Non-graphical user interface

There are now three (3) options for a home page from which a user can choose. The default user interface (UI) for all users is the graphical campus map. Users can also choose to view a text-based UI or they can select to view the Personal KC- Personal Learning Plan page in place of the campus map. User interface options can be selected upon registering to the Knowledge Centre and can be modified in the Personal KC area of the site.

2.3.3. Index

Clicking the Index icon displays an overview of the site organization alphabetized by building, then function. The name of each building and function is a link to that location in the site.

2.3.4. IDP

Clicking the IDP icon displays your Individual Development Plan (IDP). The IDP provides you with a roadmap for skill acquisition. It also serves as documentation of skills acquired through the courses taken and maps you to available training. ***This function is optional and may not be available on all sites***.

2.3.5. Glossary

Clicking the Glossary icon opens a separate window that displays a searchable list of terms that are associated with the site and/or with the online courses.

The Glossary is a tool for students to search key terms and industry vocabulary for standard definitions and descriptions.

To use the Glossary, click the letter link. A list of terms alphabetically matching that letter is returned below.

To ***Search*** the Glossary, perform the following steps:

1. Click **Search**. An option selection box appears on the left.
2. Enter search text in the Search text box.
3. Select either the containing or beginning with option buttons.
4. Click Search. The results display in a frame below.

2.3.6. Feedback

Clicking the Feedback icon opens a new window and displays a form that enables you to send an email to a site administrator from any location within the Site. Your location within the site is automatically included in the subject of the email.

To ***Send*** a feedback email perform the following steps:

1. Type your suggestion or comment in the Message field.
2. Click Send. The message is sent to a site administrator and the window automatically closes.

2.3.7. Notepad

Clicking the Notepad icon opens a new window and displays an online note-taking tool that allows you to add, edit, delete, and read notes from anywhere in the site.

Clicking displays more information about the note.

Existing notes are automatically displayed when you access Notepad. You can change the order of the notes by clicking **Sort by Date** to display the most recent note first, or **Sort by Name** to display notes sorted by subject line alphabetically.

When a new note is added to the learner's notepad, the site location and the current date are automatically saved as part of the note, allowing you to return to that location easily and quickly.

To ***Add*** a note to Notepad, perform the following steps:

1. Click **Add new note**. The Add Note Content form displays in the right frame.
2. Enter a Subject title in the subject field.
3. Enter text in the Note field.
4. Click Add.

To ***Edit*** a note in Notepad, perform the following steps:

1. Click . The Notepad notes form with the current data displays.
2. Select the field for the item(s) you wish to edit.
3. Make edits to the appropriate fields.
4. Click Update to change the information.

To ***Delete*** a note in Notepad, perform the following steps:

1. Click .
2. Click OK to confirm your choice to delete your notepad notes, ***or***
   Click Cancel to exit the function without deleting the notepad notes.

2.3.8. Research Assistant

Clicking the Research icon displays Research Assistant, which allows you to search all content in the site using keywords.

To ***Search*** the Research Assistant, perform the following steps:

1. Click the Research icon. The Research Assistant page displays.
2. Select a Topic from the drop-down list box, if desired. If selected, you only see content that is grouped by topic. To see all content, select All.
3. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
4. Enter a keyword to search on.
5. Select a Sort Option (Name, Content Rating or Content Type). When sorting by Content Rating the results page will be sorted from highest to lowest rating. Non-rated content will be displayed after rated content.
6. Click Search. The results display in a frame below, 10 items at a time.
7. If more than 10 items are returned, use the number links or the first, previous, next, and last links to page through the results.
8. Click for information on a specific item. Information displays on the right of the page.
9. If the title of the item is a link, click it to open the content item in a new window.

2.3.9. Help

Clicking the Help icon opens a separate window containing information about the functions, features, and navigation of the site. The Help function is context sensitive, meaning that it knows where you are in the site and automatically provides help information for the building that you are currently in.

To ***View*** Help ***by Building***, perform the following steps:
1. Click **by Building**.
2. Click the name of the building you want information about from the resulting alphabetical list of buildings. A description of the building, and the functions within that building, display on the right.

To ***View*** Help ***by Function***, perform the following steps:
1. Click **by Function**.
2. From the resulting alphabetical list of functions, click the name of the function you want information about. A description of the function and the building that houses it display on the right.

To ***View*** Help ***by Keywords***, perform the following steps:
1. Click **by Keywords**.
2. Enter a keyword or phrase and click Display. All of the functions that contain that keyword and a description of each function and the building that houses it displays on the right.

2.3.10. Log Out

This function allows you to log out of the site. When you click this, the Login Page displays again and you will have to enter your Login ID and Password to access the site again.

2.4. Side Toolbar

The side toolbar is always available to you from anywhere in the site. It contains links to all the buildings as well as several other functions:

- Announcements – Displays site announcements.
- Personal KC – Displays a personal page that contains links to your transcript and other personal information. You can customize this page with shortcuts and links to other information in the site.
- Surveys – Displays a list of site surveys in which you can participate.
- What's New – Displays a list of content that was added since the last time you logged into the site.
- Top Ten:
  - Contributors – Displays a list of the top ten contributors of content to the site.
  - Resources – Displays a list content that has been the accessed frequently by other users in the site.
  - Searches – Displays a list of the ten most recurrent searches by users in the site.

2.4.1. Announcements

Announcements are current bulletins or important communications intended for all users. Content or Site Administrators add announcements to the site as a means of making information available to all users of the site at once.

To ***View*** Announcements, perform the following steps:

1. Click the Announcement icon. A list of announcements displays including title, date, and time posted, and the announcement.
2. If the title is a link, click the title to display additional information.

2.4.2. Personal KC

The Personal KC page is a single point of access to personal training and development information. The page includes links to your Individual Development Plan (if installed in the site), Transcript, Personal Learning Plan, Training Schedule, Shortcuts, Search History, Peers, and Course Bookmarks.

Specifically, the Personal KC page provides:

- Individual Development Plan – Links to:
  - Current IDP
  - Archived IDPs

Personal Skills Survey
Peer Skills Surveys

- Transcript – Links to:
  View Student Transcript
  Access online certification
- Course Bookmarks – Links to:
  Your personalized Course Bookmarks
- Personal Learning Plan – Links to:
  List of all classroom courses in which you are currently enrolled or waitlisted
  List of all self-paced courses that are currently in progress
  List of all certification training this is in progress
  Sort by Course Name, Date, or Status
- Shortcuts – Links to:
  Selected site content
  Sort by Content Type, Name, or Date Added
- Search History – Links to:
  View results of your 25 most recent searches
- My Peers – Links to:
  View a listing of site users who you have selected as Peers
  Access biographical and contact information about your Peers
- User Interface
  Select from the campus map graphical metaphor user interface, the text-based user interface or the Personal KC- Personal Learning Plan interface.

Features and functions for the Personal KC page are explained in the sub sections below.

2.4.2.1. Individual Development Plan

The Individual Development Plan (IDP) is an add-on option for the Meridian KSI Knowledge Centre™. If your site incorporates the IDP add-on module, then the Individual Development Plan section of your Personal KC page is your link for launching all the functions available to you including access to your:

- Current IDP
- Archived IDPs
- Skills Survey

See IDP documentation for a full explanation of functions.

2.4.2.2. Personal Learning Plan

The Personal Learning Plan provides a consolidated view of up-to-date training progress for all course types. Current information on classroom courses enrollment (or waitlist), self-paced training and mandatory training is visible from the Personal Learning Plan tab.

The Mandatory Training section displays all assigned training and the completion status of each assigned course

The Classroom course section of the Personal Learning Plan displays section information for classroom courses including the date, time, and instructor for the courses. There are links to information about course location and instructor. If there is further information associated with the location (such as Facilities or hotel information), the **Location** link would be live. Clicking on the name of the location opens a new window to display further location information. Clicking the **Instructor** link displays the instructor's name in a new window with user information about the instructor. You can then click on the instructor's email address link to create and send an email message to that instructor.

Status information for Self-Paced courses includes the course name and the date course was started. The Mandatory Training course information includes the list of courses assigned and their completion status.

2.4.2.3. Shortcuts

The Shortcuts tab displays user-added links known as shortcuts. Shortcuts can be any content element of the site that you have chosen to create a shortcut link to on your Personal KC page. The following explains how to sort, view, add, and remove content elements from your Personal Content.

- Click **Content Type**. The page refreshes with the Personal Content portion of the information sorted alphabetically by the type of content.
- Click **Name**. The page refreshes with the Personal Content portion of the information sorted alphabetical by the name of the content item. Numerals always display before letters. For example "101 Dalmatians" will appear before "A Word to the Wise".
- Click **Date Added**. The page refreshes with the Personal Content portion of the information sorted chronologically by the date the content item. The most recently added content is presented at the top of the list.
- Click **View**. A new window opens to display the content item.
- Click **Remove** to the remove shortcuts to content from your Personal page.
- Click **more** to open a new window that contains more information about the content item. The new window also allows you to rate and comment on the content item and also to read comments entered by other site users. See Section 1.1.6 Commenting and Rating Content in Part 1- Introduction for more information about commenting and rating content.

To ***Add*** a Content Shortcut, click Add to Personal KC when it appears at the top of you content display on the right. When you request access to a course that requires approval, the course is automatically listed here if access is granted.

To ***Delete*** a Content Shortcut, click the **Remove** next to the content item you want to delete.

You can create a shortcut link on your Personal KC page to any content in the site, including courses. Every content display page contains an Add to Personal KC button.

2.4.2.4. Search History

Search History displays a listing of your five most recent searches. The listing displays the function you were in when you conducted the search, the keyword and search type, as well as the topic and category used in your search criteria. The display also lists the number of items returned from that search query. Clicking **View Results** brings you to that function and displays the results as if you had just run the query.

Note: Search History only includes searches that included a keyword and that displayed at least one record.

2.4.2.5. My Peers

My Peers is a listing of shortcut links to people in the site that you have chosen as Peers. This helps you locate information about people in your site in a specific discipline, field of study, or Community of Practice (CoP). A community of practice (CoP) is a group of people that share a common vital interest and have committed to working together to build a collective knowledge base around that interest. You can add any registered user of the site to your Peers by searching in PeerNet (a function located in the Coffee Shop building of your site).

You can create a shortcut link to your Peers on your Personal KC page. The people you can select Peers from appear in the listing in the Coffee Shop building/PeerNet function. When the PeerNet listing appears, click the info icon. The information page contains an **Add to My Peers** button.

To ***Add*** a Peer to your Personal KC, perform the following:

1. Click **Add to My Peers** when it appears at the top of you content display on the right.

To ***Delete*** a Peer from your Personal KC, perform the following:

1. Click **Remove** next to the Peer that you want to delete.

2.4.2.6. Transcript

Student Transcript is a shortcut link to your training record, which lists courses you have accessed and completed within the Knowledge Center. See the section titled Student Transcript for complete instructions for your Student Transcript.

2.4.2.7. Course Bookmarks

This link on the Personal KC page leads directly to the function Course Bookmarks, which are links that you can create to view pages in a course that you want to refer to in the future. Please refer to the section titled Course Bookmarks for more information.

2.4.2.8. User Interface

The User Interface tab allows users to select from three interface options. The default user interface (UI) for all users is the graphical campus map. Users can also choose to view a text-based UI or they can select to view the Personal KC- Personal Learning Plan page in place of the campus map.

To change from the default graphical interface, choose one of the following:

- Select the I wish to use the graphical user interface then Click Submit
- Select the I wish to use the text-based user interface then Click Submit
- Select the I wish to use the Personal KC interface then Click Submit
- Click the Preview link next to each option in order to view user interface option.

2.4.3. Surveys

Surveys are online questionnaires for soliciting user information or feedback about various subjects.

To ***Access*** a survey, perform the following steps:

1. Click the Surveys icon.
2. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
3. Enter a keyword to search or leave it blank to view all.
4. Click Search. Results display in a frame below.
5. From the resulting list, click for additional information or if the title is a link, click the survey title to access the survey.
6. If you have already completed the selected survey, the completion date is displayed. You cannot take a survey more than once.

Surveys are made up of two kinds of questions: 1. Selecting from a range of values, and 2. Free answer.

Questions in a survey are divided into categories. Each category can have its own upper and lower values (i.e., often to never) and number of choices. Free answer questions come in the form of comment boxes.

To ***Complete*** a Survey, perform the following steps:

1. Select one of the option buttons between the two values for each question in a category. If you choose not to answer or the question does not apply, select the circle next to *No Answer*.
2. If there are comment boxes, type in your answer(s) in the box(es) provided.
3. Click Submit to complete and send your survey. All questions must be answered, or you will get a prompt to answer any questions you have skipped before you can submit the survey.
4. Once you have clicked Submit, you will be unable to change your answers.

One of the Knowledge Management features of the site is the ability for you to exchange opinions about content and share what you think about the resources in the site. This allows you to collaborate with all members of the site so that the transfer of knowledge, information, and other important news can be communicated easily among your Communities of Practice (CoPs) or any other interest group in the site.

All content in the site can be rated for usability. This allows you and other site users to assign ratings to the content (a scale of one to seven with seven being the most useful). This in turn helps you and others locate information useful to you when you need it. By viewing the ratings of the content before you view the actual content, you can determine if the item is suitable for your research. In addition, all users can add comments to their ratings, which further aids in the search for useful content. By reading comments contributed by others, you gather more details about the content. This further helps you when determining the usability of content. (Comments and ratings are explained in detail in Section 1.1.6 – Rating and Commenting on Content in Part 1- Introduction.)

2.4.4. What's New

The What's New function displays information about new content that has been added since the last time you logged into the site. The content items displayed in this function includes courseware but does not display individual courseware elements such as Learning Objects (LOs), or SCORM Sharable Content Objects (SCOs).

Content information is displayed in a list containing the title and the date the content item was added. The items also contain a link on the contributor's name that accesses an email function to communicate directly with that person.

***Note**: Date is the date the content was added to the site - the date for content that has been updated is not reflected in any list or search results.*

Each item also displays links to either view more information about the content or view the content item itself.

Clicking **Info** opens a new window to display information about the content. The new window also displays a link to view ratings and comments about the content. (Comments and ratings are explained in detail in Section 1.1.6 – Rating and Commenting on Content in Part 1- Introduction.)

Clicking **View** opens up a new window to display the content item.

You can further refine your results by using the Search Tools link located at the top of the page.

Search Tools > > – activates the search utility functions to expand or refine the results you wish to display within the What's New categories.

1. Select your search criteria. The search criteria function fields are explained below. *Fields with * asterisks are required.*

*Number of items	Select 5, 10, 15, 20, 25, 30, 40, or 50 to determine the number of items returned and displayed.
Topics	Select a topic to narrow your search results to return only content associated with a selected topic or leave it blank to include all content.
Date:	Select 1 day, 1 week, 2 weeks, or from 1 to 6 months to narrow your search results to within a time range or leave it blank to have your query not constrained by a time range.
Keywords	Enter words and phrases to narrow your search results or leave it blank to leave your query unconstrained by keywords.
All Words/Any Words/Exact Phrase/Boolean	Select a search criterion to further refine your keyword(s) search.

2. Click Search to begin your search, ***or***
3. Click Clear to clear the fields.
4. Click **Info** to open a new window to display information about the content site.
5. Click **View** to open a new window to display the content item.
6. Click the link of the persons name to open a new window to display information about that person.

Clicking **<< Search Tools** – deactivates the search utility.

2.4.5. Top Ten Contributors

Another feature of the site is the ability to view a list of the top ten contributors of content to the site. This helps you locate content added by users who contribute often. The Top Ten Contributors is a quantitative designation based on the number of items contributed by an individual, however, there are other features that can help you fine tune the results to view and to select content based on quality. These are the ratings and comments (the same mentioned in Top Ten Resources) information that you and other users can assign to content in the site.
Clicking **Info** opens a new window to display information about the content. The new window also displays a link to view ratings and comments about the content. (Comments and ratings are explained in detail in Section 1.1.6 – Rating and Commenting on Content in Part 1-Introduction.)

Clicking **View** opens up a new window to display the content item.

The Top Ten Contributors function also allows you locate content submitted by experts in their field (based upon the qualifications they entered in User Profile). By adding a word or a phrase to your search query, you can further narrow your results to display content added based on an individual's qualifications. This helps you locate information in a given discipline, field of study, or Community of Practice (CoP).
You can further refine your results by using the Search Tools link located at the top of the page.

Search Tools > > – activates the search utility functions to expand or refine the results you wish to display within the Top Ten Contributors categories.

1. Select your search criteria. The search criteria function fields are explained below. *Fields with * asterisks are required.*

*Number of items	Select 5, 10, 15, 20, 25, 30, 40, or 50 to determine the number of items returned and displayed.
Since (Select a Month)	Select 1 day, 1 week, 2 weeks, 1-9 months, 1 year, 1.5 years, or 2 years to narrow your search results to within a time range or leave it blank to have your query not constrained by a time range.
Since (Select a Year)	Select a year to narrow your search by year or leave it blank.
Keywords	Enter words and phrases to narrow your search results. Keywords can be a users name, title, or can be based on the contributor's qualifications as they've indicated in their PeerNet Profile). You may also leave it blank.
All Words/Any Words/Exact Phrase/Boolean	Select a search criterion to further refine your keyword(s) search.

2. Click Search to begin your search query, ***or***
   Click Clear to clear the fields.
3. Click **Info** to open a new window to display information about the content site.
4. Click **Contributions** to open a new window to display a list of all contributions by that person (with links to further view each content item or view comments about each content item).

Clicking **< < Search Tools** – deactivates the search utility.

2.4.6. Top Ten Resources

The Top Ten Resources function displays content that has been the accessed frequently by other users in the site. The more it has been accessed, the higher it is ranked as a resource. This ranking is not based on ratings or comments that you or other users can add about content; ratings and comments provide an additional way to rate the content and further define for others the content's usefulness.

This content includes courses but does not include LOs or SCOs.

Note*: Date is the date the content was added to the site - the date for content that has been updated is not reflected in any list or search results.*

Each items also displays links to either view more information about the content or view the content item itself.

Clicking **Info** opens a new window to display information about the content. The new window also displays a link to view ratings and comments about the content. (Comments and ratings are explained in detail in Section 1.1.6 – Rating and Commenting on Content in Part 1- Introduction.)

Clicking **View** opens up a new window to display the content item.

You can further refine your results by using the Search Tools link located at the top of the page.

Search Tools > > – activates the search utility functions to expand or refine the results you wish to display within the Top Ten Resources categories.

1. Select your search criteria. The search criteria function fields are explained below. *Fields with * asterisks are required.*

*Number of items	Select 5, 10, 15, 20, 25, 30, 40, or 50 to determine the number of items returned and displayed.
Topics	Select a topic to narrow your search results to return only content associated with a selected topic or leave it blank to include all content.
Since (Select a Month	Select a month (January through December) to narrow your search results to within a time range or leave it blank to have your query not constrained by a time range.
Since (Select a Year)	Select a year to narrow your search by year or leave it blank.
Keywords	Enter words and phrases to narrow your search results or leave it blank to leave your query unconstrained by keywords.
All Words/Any Words/Exact Phrase/Boolean	Select a search criterion to further refine your keyword(s) search.

2. Click Search to begin your search, ***or***
   Click Clear to clear the fields.
3. Click **Info** to open a new window to display information about the content site.
4. Click **View** to open a new window to display the content item.
   Click the link of the persons name to open a new window to display information about that person.

Clicking **< < Search Tools** – deactivates the search utility.

2.4.7. Top Ten Searches

Another feature for locating useful information is the Top Ten searches. The top ten searches allow you to view a list about the results of the most often-run queries executed by users of the site. From this list, you can see information about which queries have been run the most often and what functions and keywords were used in those queries. Other search criteria are included in the list such as search type and category (where applicable). A link is also provided to let you view the results of the query.

The date the query is run is displayed, however, the content of the query results is not based on the date the query was first run but by the most current content in the site. So if a top ten search was added to the list a month ago and you were to view the results today, it would include content that was added to the site *since* that search was added to the top ten list and not just since the day it was run.

The Top Ten Searches fields are explained below.

Function	Displays the name of the function where the original query was run.
Keywords	Displays the keyword or keywords used in the search. ***Note**: All top Ten Queries are based on queries containing keyword search results.*
Search Type	Displays the search type that was used in conjunction with keyword criteria (choices could be All, Any, or Boolean).
Date	Displays the date the query was run.
Topic	Displays the topic used as part of the search criteria; displays “No Topic” if no topic was used in the search.
Category	Displays the category used as part of the search criteria; displays “No Category” if no category was used in the search.
Results	Displays the number of resulting items. **Note**: this number includes content to date and is not based on the number of items when the query was first run.

Clicking **View Results** brings you to the function where the query was original run. For example, if the query were run in Periodicals, clicking this link would bring you to Periodicals and display the search criteria on top and the search results on the left side as if you had just run the query yourself from that function.

You can further refine your results by using the Search Tools link located at the top of the page.

Search Tools >> – activates the search utility functions to expand or refine the results you wish to display within the Top Ten Search categories.

2.5. Administration

The Administration Building is the location for training related functions that are administrative in nature. Access to different functions within this building depends on the level of access you have been given as a user.

The Administration building provides general information available to all users such as individual transcripts, user profile maintenance, training facilities, and a user directory.
It also contains features such as course management, content management, and training records that are not available to all users. You will only see the functions that you have rights to access.

The Administration building houses the following functions:

- Facilities
- Faculty Lounge (course and content management)
- Student Records (individual user profile and transcript)
- User Directory

2.5.1. Facilities

Facilities show you detailed information for the classroom-based training facilities, including addresses, directions, maps, equipment, and contact information. This allows you to easily locate a training facility and contacts.

To ***Access*** Facilities, perform the following steps:

1. Click the **Facilities** link or graphic icon.
2. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 5.
3. Select a State from the drop-down down list box.
4. Click Search to see a list of training facilities in that area.
5. Click . Additional information displays on the right.
6. Click on the links under the facility name to open a window that displays more information

2.5.2. Faculty Lounge

The Faculty Lounge requires special access for most features. This is where site administrators, content owners, and course owners manage features and content in the site. The only function in the Faculty Lounge available to all users is the Instructor Directory. Those functions that require additional permissions for access are discussed in more detail in Part 3 – Content Administration, Part 4 – Course Administration, and Part 5 – Site Administration.

2.5.2.1. Instructor Directory

The Instructor Directory provides biographical and contact information about faculty members.

To ***Access*** the Instructor Directory, perform the following steps:

1. Click the **Instructor Directory** link or graphic icon. The Instructor Directory search frame displays.
2. Enter all or part of a person's last name or leave it blank to view all.
3. Click Search. The results display below.
4. Click to view information about the instructor, including a link to send them email.

2.5.3. Student Records

The Student Records function allows you to access and update your individual profile and transcript information. From here, you can view course information for classes you have accessed and/or completed. You can also add other items to your transcript, including outside learning events such as seminars, talks, and classes. You can also update your personal information such as login, password, organization, and profile.

The Student Records function contains the following sub-functions:

- Change Login
- Change Organization
- Change Password
- Learning Events
- Student Transcript
- Update Profile

2.5.3.1. Change Login

Your Login ID is your unique identifier used for access to the site. You may change your Login ID at anytime. This will not affect your information, site activity, or training record.

To ***Change*** your Login ID, perform the following steps:

1. Click Change Login.
2. Enter your current login in the Current Login field.
3. Enter a new login in the New Login field.
4. Click Submit to change your login ID, ***or***
   Click Cancel to exit without changing your login ID.
5. Once you change your Login ID, the change is effective the next time you enter the site.

2.5.3.2. Change Organization

Your organization is the group or division within the company with which you are associated. It is used to tailor your experience in the site to content and features most pertinent to you. When you first enter the Change Organization page, your current organization is as you selected it during registration.

To ***Change*** your Organization, perform the following steps:

1. Click **Change Organization**.
2. Select a new organization from the top drop-down list box (if there is more than one).
3. Click Expand to view sub-organizations within the selected organization. Repeat until you have found your organization.
4. Click Select to choose the current organization, or
   Click Cancel exit without changing your organization.
5. If your organization is not available via these menus, perform these additional steps:
6. In the Other Organization text box, type the name of your organization.
7. Click Select to choose the current organization, or
   Click Cancel to exit without changing your organization.

2.5.3.3. Change Password

Your password is verified against your Login ID to allow secure access to Site functions. You may change your password at anytime.

To ***Change*** your password, perform the following steps:

1. Click **Change Password**.
2. Enter your current password in the Current Password field.
3. Enter a new password in the New Password field. Your Password must be at least four characters and consist of only numbers, letters, or underscores. *Passwords are case-sensitive.*
4. Type the new password again in the Confirm New Password field.
5. Click Submit to change your information, or
   Click Cancel to exit without changing your password.
6. Once you have changed your password, the change is effective the next time you enter the site.

2.5.3.4. Learning Events

A Learning Event is an educational activity such as a college course, seminar, or conference that occurred outside the site that you wish to have included on your student transcript. This function lets you add, edit, and delete your own Learning Events.

To ***Add*** a new Learning Event, perform the following steps:

1. Click **Learning Events**.
2. Click **Add new learning event**.
3. Type the name of the event in the Event field.
4. Enter a date in the Completion field (Enter date as mm/dd/yyyy), or
   Click to activate the calendar control. The calendar displays in a separate window.
5. Click >> or << to change year
   Click < or > to change the day
   Click Today to select the current date
6. Enter a number in the Score field (Example: 90).
7. Select Pass or Fail from the Pass/Fail option buttons.
8. Select a Method / type of event from the drop-down list box.
9. Enter the CEUs in the CEUs field.
10. Indicate if the event resulted in a Certificate by Selecting Yes or No from the Certification option buttons.
11. Type a summary of the resulting skills in the Skills text box.
12. Click Add to include the learning event in your transcript, or
    Click Cancel to exit without adding your learning event.

To ***View*** details about a Learning Event, perform the following steps:

1. Click next to the desired learning event.

2. View your existing information displayed on the right of your screen.

To ***Edit*** a previously entered Learning Event, perform the following steps:

1. Click next to the event you wish to edit. The learning event form with the current data displays.
2. Make edits to the appropriate fields.
3. Click Add to change the information, ***or***
   Click Cancel to exit without editing your learning event.

To ***Delete*** a Learning Event, perform the following steps:

1. Click . A confirmation dialog box appears.
2. Click OK to delete your learning event, ***or***
   Click Cancel to exit without deleting the learning event.

2.5.3.5. Student Transcript

Student Transcript is your training record: a list of site courses and curriculum you have accessed and completed as well as information about learning events you have taken outside the site.

Because of the various types of information that are tracked, the Transcript has several sections to it:

- Classroom and online courses. Most courses accessible through the site are recorded in this section.
- SCORM compliant courses. SCORM is a courseware standard that many course developers adhere to. Courseware developed to this standard has particular requirements and is therefore tracked and listed separately.
- User added learning events. Training activities that you have completed outside of the site and entered into the system are displayed in this section.
- Curriculums. Curriculum progress and summary information of all courses in the curriculum display here. Each courses progress is also recorded in the appropriate course section.
- Approval Requests. When you request access to a course or curriculum that requires approval, that request and all subsequent action is recorded here.

To ***View*** and ***Print*** your Student Transcript, perform the following steps:

1. Click **Student Transcript**.
2. Click **Courses Only** (the default view) to display only courses in your transcript, or
   Click **Course & Lessons** to display your complete transcript.
3. Click in the frame that contains your transcript.
4. Use your browser print function to print your transcript.

Course Information

To view information about a course listed on your transcript, click **info**. A new window opens with the course information.

Certificate from Transcript

Some courses provide certificates of completion once you have completed the course. The titles of these courses will be displayed as links.

To ***View*** and ***Print*** your certificate, perform the following steps:

1. Click **certificate**. The certificate displays in a new window.
2. Click on the frame that contains your certificate.
3. Use your browser's print function to print your certificate.

Course and Curriculum Details

Some courses and all curriculums have a link to details. Course details vary from course to course, and include information on progress and status in smaller units of the course. Curriculum details include a summary of progress for each course in the curriculum.

2.5.3.6. Update Profile

You entered your Profile content and professional information when you first registered at the Site (or it was entered for you by your system administrator). You can change the information in your profile at any time.

To ***Update*** your Profile, perform the following steps:

1. Click **Update Profile**.
2. Change your profile by typing over the information in the field(s) that you wish to change. *All required fields are marked with an *asterisk.*
3. Select which User Interface you would like to use for the main page. Selecting the Graphical radio button will present a Campus Map graphic on the Home page. Selecting Text will present a series of folders with rollover links to functions contained within.
4. Check "Send me updates and notification of content changes at this email address." if you would like to receive updates periodically.
5. Check "Make this information available to others in the User Directory." if you would like other users to view your contact information.
6. Click [Submit] to change your information, or
   Click [Reset] to clear new data entered and not change your profile, or
   Click [Cancel] to exit without editing your profile.

2.5.4. User Directory

The User Directory is a list of site users and instructors who have elected to make their information available to others.

To ***Search*** for users or faculty members in the User Directory, perform the following steps:

1. Click the **User Directory** link or graphic icon.
2. Enter all or part of the last name of the person you want to search in the Last Name field.
3. Select an option button (either Users or Faculty).
4. Click Search. A list of records displays in the frame below.
5. Click to view user information.
6. To send email to the user, click the email address link. An Email Content form opens in a new window.
7. Enter a subject and message.
8. Click Send to send the message to the recipient, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending your email.

Note*: You can add or remove yourself from the User Directory by selecting Update Profile from the Student Records menu and modifying your profile accordingly. See Update Profile.*

2.6. Career Center

The Career Center provides information and tools that may assist in your career development.

This building hosts the following functions:

- Associations & Organizations
- Career Books
- Career Corner - Employer
- Career Corner - Individual
- Career Sites
- Tutorials

2.6.1. Associations & Organizations

Associations and Organizations are industry-specific groups. Each Association and Organization selected provides a description, short history, and a link to that group's web site in an effort to provide easy access for you.

To ***Access*** Associations & Organizations, perform the following steps:

1. Click the **Associations & Organizations** link or graphic icon.
2. Select a Topic from the drop-down list box to view associations and organizations for that topic. Select All to return associations and organizations from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*

3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the association or organization title link to open a new window that displays that Association or Organization's website.

2.6.2. Career Books

Also available at the Career Center, you have the option of searching for recommended career-related publications. These are listed under the Career Books link and are grouped by category with title, author, and summary information.

To ***Access*** and/or ***Order*** Career Books, perform the following steps:

1. Click the **Career Books** link or graphic icon.
2. Select a Topic from the drop-down list box to view career books for that topic. Select All to return career books from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 7.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).

5. Select Title or Author from the drop-down list box to sort alphabetically.
6. Click Search. A list of results displays in the frame below.
7. Click for information on a specific book. Information displays on the right.
8. If the book title is a link, click the link to open a new window with additional information related to the book.
9. If there is an **Order now direct** link, click it to open a new window that displays a page to order the book from Amazon.com.

Note*: Meridian Knowledge Solutions, Inc. is not responsible for any content on Amazon.com. You are responsible for the costs associated with the purchase of any books from Amazon.com.*

2.6.3. Career Corner - Employer

This function requires special permission (Career Center Employer or Site Administrator) and is explained in the Site Administrators Guide.

2.6.4. Career Corner - Individual

The Career Corner for Individuals allows you, as a registered user of the site, to post an electronic resume and to search and respond to internal position openings and team building opportunities. Job openings may be searched by keyword, salary requirement, job category, and/or location. Potential managers can search resumes. A check box on the resume form indicates whether or not a user is actively looking for a new position/opportunity.

Until you submit a resume, you will be given the chance to post one. After posting a resume, you will be able to update it at any time.

2.6.4.1. Post/Update Resume

To ***Post*** or ***Update*** your Resume, perform the following steps:

1. Click **Update resume**. A resume form displays.
2. Complete the form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

Note: *Information at the top of the form including your name, phone number, fax number, address, and email is pulled from your registration profile. (See Administration Building, Student Records, Update Profile to modify this information).*

*Summary of Qualifications	Enter your qualifications.
*Education	Enter your educational background.
Current Position	Enter current position.
From	Enter when you began your current position.
*Responsibilities	Enter your responsibilities.
*Additional Relevant Experience	Add any additional experience.

3. Select Yes, I would like to be contacted by other managers regarding vacancies if you would like to be contacted. If not, leave the box un-checked.
4. Click Submit to insert your resume, ***or***
   Click Reset to clear the fields in your resume, ***or***
   Click Cancel to exit without inserting your resume.

To ***Search*** for posted positions/opportunities, perform the following steps:

1. Enter a keyword to search on or leave it blank to view all.
2. Select a State from the drop-down list box.
3. Select a Country from the drop-down list box.
4. Select a job type from the drop-down list box.
5. Click Search to view results, ***or***
   Click Reset change your query.
6. Click the posting title link to open a new window that displays detailed information about the position.
7. Click, YES, I want to submit my resume to this manager, if you want to apply for the position.

2.6.5. Career Sites

You can find recent articles and web sites addressing job-related topics through the Career Sites link. The sites are grouped into categories and have summary information and a link to the web site.

1. Click the **Career Sites** link or graphic icon.
2. Select a Topic from the drop-down list box to view career sites for that topic. Select All to return career sites from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the Career Site title link to open a new window that displays the site.

2.6.6. Tutorials

Tutorials are short lessons on various professional and office related subject such as career, communication, and software. These tutorials are intended for use as a "help" tool and will not appear on your Student Transcript.

1. Click the **Tutorial** link or graphic icon.
2. Select a Topic from the drop-down list box to view tutorials for that topic. Select All to return tutorials from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the Tutorial title link to open a new window that displays the tutorial.

2.7. Coffee Shop

The Coffee Shop was built in an effort to restore some aspects of human interaction that occur in face-to-face, traditional classroom settings. The Coffee Shop promotes informal contact and discussion similar to a traditional "Coffee break".

This building hosts the following functions:

- Books
- Bulletin Board
- Hot Topics
- Newsletter
- PeerNet

2.7.1. Books

The Books function is a collection of industry-specific publications that may also enhance the learning experience. They are searchable by topic and/or keywords and can be ordered online through a direct link to Amazon.com, if your organization supports this feature.

To ***View*** and/or ***Purchase*** books, perform the following steps:

1. Click the **Books** link or graphic icon.
2. Select a Topic from the drop-down list box to view books for that topic. Select All to return books from all topics.
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 7.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Select Title or Author from the drop-down list box to sort alphabetically by either title or author.
6. Click [Search]. A list of results displays in the frame below.
7. Click for information on a specific book. Information displays on the right.
8. If the book title is a link, click the link to open a new window with additional information related to the book.
9. If there is an **Order now direct** link, click it to open a new window that displays a page to order the book from Amazon.com.

Note*: Meridian Knowledge Solutions, Inc. is not responsible for any content on Amazon.com. You are responsible for the costs associated with the purchase of any books from Amazon.com.*

2.7.2. Bulletin Board

The Bulletin Board is a discussion-based forum where you can post, read, and respond to messages posted by other users. The Bulletin Board is divided into forums. You can browse messages by keywords or by forum.

To ***Browse*** messages, perform the following steps:

1. Click the **Bulletin Board** link or graphic icon.
2. Click on the drop-down list box to select a forum.
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Click [Display] to show all messages in the selected forum. The message tree for that forum displays, ***or***
   Click [Search Forum] to search the selected forum using your keyword(s). Links to the resulting messages display, ***or***
   Click [Search All] to search all forums using your keyword(s). Links to the resulting messages, organized by topic, display. ***Note:*** *You must enter a keyword to Search All.*
5. If you **displayed** messages, click the title of the message. The full message will display at the top of the page.

6. If you **searched** messages, click the message link to see the full message at the top of the page.

The following options are available from the message tree.

To ***Add*** a new message to the forum, perform the following steps:

1. Click the Start New Thread icon. A form displays.
2. Enter the message subject and text.
3. Click Post to add the message to the forum, ***or***
   Click Cancel to return to the message tree without adding the message.

To ***Reply*** to a message, perform the following steps:

1. At the bottom of the message you wish to respond to, click the Reply icon. A form displays.
2. Enter the message text.
3. Click Reply to post your reply to the message, ***or***
   Click Cancel to return to the message tree without adding your message.

To find the current message in the tree, click the Jump to this message below icon. The current message will appear in red within the tree at the top of the page.

To return to your search from the message tree, click the Return to Search icon. Your search will display. The most recent message that you selected will be marked as **(last read)**.

2.7.3. Hot Topics

The Hot Topics link is where new industry-related issues are periodically posted and open for review. You can read comments posted by your peers and post your own comments to the site. At the bottom of the page there are links to related sites containing information about the current "hot topic".

By participating in Hot Topics, you agree with the discussion guidelines, which can be seen by clicking the **ground rules** link located in the introduction paragraph.

To ***Participate*** in Hot Topics, perform the following steps:

1. Click the **Hot Topics** link or graphic icon.
2. Scroll through posted messages using the browser scroll bar on the right. At the bottom of the page is a form to post a new message to the discussion.
3. Enter your message in the form.
4. Click Post Message to add your message to the bottom of the discussion list.
5. Click the Related Sites links at the bottom of the page for additional information about the current topic.

2.7.4. Newsletter

The Newsletter function of the Coffee Shop links you to recent publications of the company newsletter and allows you to access archived versions of the newsletter. This site also offers links to major newspapers and webzines that may be of interest to you. These archives are searchable by keyword and the list that appears provides a brief summary of the publication making it easy to find desired versions.
To ***View*** a Newsletter, perform the following steps:

1. Click the **Newsletter** link or graphic icon.
2. Select a Topic from the drop-down list box to view newsletters for that topic. Select All to return newsletters from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the Newsletter title link to open a new window that displays the newsletter.

2.7.5. PeerNet

PeerNet is a great way to find expertise, network with coworkers, and become known in the community. This collection of online business cards contains contact and professional information as well as individual areas of expertise, skills, talents, products, and services depending on what you choose to reveal. You can make your information available here, edit information you already supplied, and also search for other individuals by simple or expanded search.

To ***Search*** PeerNet, perform the following steps:

1. Click the **PeerNet** link or graphic icon.
2. Enter search criteria (see below).
3. Click Search. The results will display below.
4. Click . Additional information will display on the right.
5. Click the email address link to open a new window that displays a form to email that person.
6. Click Add to My Peers to add that person to your Personal KC page.

Search Criteria: There are two types of searches in PeerNet: simple and expanded.

1. **Simple Search.** Enter keywords only.
2. **Expanded Search.** Enter any or all of the following: First Name, Last Name, Company, City, State, and Qualification Keywords.

You can toggle between the two by clicking **expanded search >>** to access the expanded search criteria fields, or **simple search>>** to return to the simple search format.

2.8. Conference Center

The Conference Center is an informational site containing various links that lead you to industry related experts.

This building hosts the following functions:

- Buyer's Guide
- Demonstrations
- Exhibit Hall
- Technical Papers

2.8.1. Buyer's Guide

The Buyer's Guide is a list of organizations that have taken the opportunity to advertise their services in the Conference Center. You can search for a specific company by service provided, location, keyword, or they can view the entire list to find the organization of their choice.

To ***Search*** the Buyer's Guide, perform the following steps:

1. Click the **Buyer's Guide** link or graphic icon.
2. Select a Service Type to search on from the drop-down list box or leave *none selected* to view all.
3. Select a State to search on from the drop-down list box or leave *none selected* to view all.
4. Select a Country to search on from the drop-down list box or leave *none selected* to view all.
5. Enter a keyword to search on or leave it blank to view all.
6. Click Search. The results display below.
7. Click . Additional information displays on the right,
8. Click the Organization name link to open a new window that displays the organization's web site, ***or***
   Click the email address link to open a new window that displays a form to email the contact person.

2.8.2. Demonstrations

The Demonstrations area contains presentations focused on recent industry technology news and advances.

To ***View*** Demonstrations, perform the following steps:

1. Click the **Demonstrations** link or graphic icon.
2. Select a Topic from the drop-down list box to view demonstrations for that topic. Select All to return demonstrations from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).

5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the Demonstration title link to open a new window that displays the first page of the demonstration.

2.8.3. Exhibit Hall

The Exhibit Hall links users to a central location for featured partners, organizations, and vendors. Clicking the appropriate link allows you to request additional information from the company, or visit the company web site.

To ***Access*** the Exhibit Hall, perform the following steps:

1. Click the **Exhibit Hall** link or graphic icon.
2. Click **View** to view the website for that organization, ***or***
   Click **Info** to see information about the organization, ***or***
   Click **Request Information** to send an email requesting additional information.

2.8.4. Technical Papers

The Technical Papers link directs the learner to industry-related publications, presentations, and articles. The site is searchable by keyword and summaries, including author and source information.

To ***Access*** Technical Papers, perform the following steps:

1. Click the **Technical Papers** link or graphic icon.
2. Select a Topic from the drop-down list box to view technical papers for that topic. Select All to return technical papers from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the Technical Paper title link to open a new window that displays the paper.

2.9. Learning Center

The Learning Center serves as a base for many different functions. Functionality within the Learning Center may include a course catalogue, a schedule of pending sessions, CBT delivery, links to external training providers, student enrollment, and training administration and trainer functions.
This building hosts the following functions:

- Course Bookmarks
- Course Information & Enrollment

- Curricula
- Notes & Assignments
- Software & Plug-ins

2.9.1. Course Information & Enrollment

The Course Information and Enrollment serves as a course catalogue that you can search for courses by topic or keyword. Once a list of specific courses is generated, you can read a summary of the course, take the course, enroll in the course if it is classroom based, or cancel enrollment in the course if you have already enrolled in it. At the end of most courses, you must take a test to see if all learning objectives were accomplished. Upon completion of the test, you can print out a certificate proving completion of the course, look at the feedback including correct answers and explanations, or retake the test if you wish. A certificate of completion is only available if you have passed the test.

To ***Search for courses***, perform the following steps:

1. Click the **Course Information & Enrollment** link or graphic icon.
2. Select a topic from the drop-down list box to view courses for that topic. Select All to return courses from all topics.
3. Enter a keyword to search on or leave it blank to view all.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).

5. Click Search. The results display below.
6. Click to see more information about specific courses. The info button provides an overview and important information for classroom-based courses or for self-paced courses, with the option to access the self-paced course. You can also access a specific self-paced course by clicking on the title link of the course you wish to take. Self-paced or Classroom Course types are enclosed in brackets [course type] after the course title.

2.9.2. Course Access Approval

Certain courses may have been set up by the course owner/administrator to require approval prior to enrollment. This is referred to as Course Access Approval. When you review the course information (by clicking the Info icon) for an online or classroom course that requires enrollment approval, the following message is displayed below the course information:

Enrollment in this course requires approval. You will receive an email when you have been granted or denied access to this course. Click the Request Access to Course button to request enrollment in this course.

To request access to the course, click the Request Access to Course button. A confirmation dialog box displays. Click OK to request access. An email is sent to the appropriate person advising them that you have requested permission to access or enroll in the course, and the course is added to the Approval Requests section of your Transcript. The history of the request process is detailed here including request dates, actions, and explanations for access denial, if provided.

For online courses, if you select the course without accessing the course information first, the Request Access to Course button will also appear on the course launch page.

The authorized administrator can grant course access, deny access, or deny access with an explanation for the denial. In any case, you and your direct manager receive email notification of the authorization action and the Transcript is updated.

If approved, you can directly access the online course or, for a classroom course, enroll in a section of your choice. If approved, an online course is added to the Shortcuts section of your Personal KC. For a classroom course, you will need to return to the course listing and enroll in a section of the course. An email will be sent to you and your manager, and the course will be added to your Training Schedule on your Personal KC page.

If your request is rejected, you will receive an email confirming this action. If the authorized administrator provided a reason for the rejected request, this will also be included in the email. If you have questions regarding the status of your access request, please contact your administrator.

2.9.3. Classroom Courses

The site enables you to enroll in classroom courses. Upon enrollment, you are immediately added to the roster, and you will receive any communications sent by the section instructor. Also, if Notes and Assignments have been established for the section, you have immediate access to them.

2.9.3.1. Section Listing

To participate in a classroom course, enroll in a section of that course.

Section information is displayed when you click associated with a classroom course. See 2.5.1.1.3 – Enroll in a Classroom Course. An example is shown below.

When you click , information about a classroom course displays, including the course name and synopsis, plus detailed section information such as:

- Your Status – Your status in the section: enrolled or waitlisted
- Your Options – What you can do for that section: enroll, waitlist, cancel enrollment
- Section Location, Date, and Time – Where and when the section is held
- Section Status – Section availability: open (can enroll) or full (can waitlist, if that section permits waitlisting)

2.9.3.2. Waitlist Feature

The Waitlist function allows you to be placed on a waitlist when the enrollment capacity of a classroom course section has reached its maximum. This features allows you to:

- Be waitlisted in multiple sections
- Have your waitlisted enrollments cancelled if you enroll in another section of the same course
- Enroll in another section of the same course if the end date of a section you are enrolled in has passed
- Be sent an email from the course owner when:
- you are waitlisted
- you are automatically enrolled in a section from the waitlist
- Be automatically enrolled in a section on a first come, first served basis. Space can become available if:
- another user cancels enrollment
- the owner increases the capacity in the course

Note: *The course owner may lower the capacity of the course, however, if the number of enrolled students is higher than the maximum capacity, the course owner will receive an email message alerting them. If the course owner decides to lower the capacity, the most recently enrolled students will be cancelled out of the course and placed at the top of the waitlist. If your enrollment is cancelled, you will be sent an email notification.*

2.9.3.3. Enroll in a Classroom Course Section

To ***Enroll*** in a Course, perform the following steps:

1. Click the **Course Information & Enrollment** link or graphic icon.
2. Select a topic from the drop-down list box to view classroom courses for that topic. Select All to return classroom courses from all topics.
3. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
4. Enter a keyword to search or leave it blank to view all.
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the **Enroll** link to enroll in an open section, ***or***
   Click the **Waitlist** link to waitlist yourself in a full section, ***or***
   Click the **Cancel** link to cancel your enrollment in a section and remove yourself from the roster, ***or***
   Click the **Cancel Waitlist** link to cancel your waitlist status.
8. In each of the above cases, a confirmation window appears.
9. Click OK to complete the option and change your enrollment status, ***or***
   Click Cancel to exit without affecting your enrollment status.

If you click:	Then
enroll and OK	your status in that section changes to enrolled and your status in all other sections becomes blank.
Waitlist and OK	your status in that section changes to waitlisted and other sections are unaffected.
cancel enrollment and OK	your status in that section becomes blank.

cancel waitlist and OK	your status in that section becomes blank and other sections are unaffected.

2.9.3.4. Enrollment by Administrator

In addition to enrolling yourself in a section of a course, it is possible for you to be enrolled by another person (a manager, training administrator, etc.). If someone else enrolls you or puts you on the waitlist, you and your manager will receive an email and the course/section will be added to the Training Schedule tab of your Personal KC. All the same rules for self-enrollment apply. You can be waitlisted in several sections of the same course, but once you are enrolled in a section you are removed from all waitlists and cannot enroll or waitlist in another section of the same course until you cancel that enrollment. You can cancel both your enrollment and waitlist status.

An authorized administrator also has the ability to remove you from enrollment or a waitlist. Again, you and your manager will receive email notifications if this happens.

2.9.4. Self-Paced Courses

Self-paced courses are courses that are taken through the Site. There are four different types of self-paced courses: learning object-based courses, SCORM courses, other online courses, and seminars. The difference is explained in the specific sections below.

Learning Object Based Courses. Learning Object based courses divide the course material into small sections called learning objects. This enables you to move chronologically through a course or target specific, discreet pieces of information, as you need them.

SCORM Courses. SCORM courses divide the course material into small sections called SCO or resources. This enables you to move chronologically through a course or target specific, discreet pieces of information, as you need them. These courses conform to an international standard that is currently under development.

Other Online Courses. There are several different types and providers of online courses. Design, navigation, features, instructional approach, and performance reporting (such as testing or course completion) may differ between courses. Follow the instructions and navigation provided in each course.

Seminars. A Seminar is Microsoft Power Point ® presentation that is converted into a series of web-accessible pages with course navigation and a table of content. It can also contain references, glossary items, and quiz questions (if applicable).

2.9.4.1. Access a Self-Paced Course (Learning Object Course)

Search for a Learning Object Course using the same steps above for Online Courses and Seminars. When you click Take Course for a Learning Object based course, the Lesson listing displays.

From the Lesson Listing, you have several options:

- Take the course in recommended order
- Access specific lessons or learning objects
- Return to the last page of courseware you accessed

To ***Access*** the course using the menu, perform the following steps:

1. Click the desired Lesson title link. The learning objects in that lesson display on the right.
2. Click the desired learning object's title link. The courseware opens in the same window. When you complete a learning object, you automatically continue to the next one in the lesson.

At the end of a lesson, you will be told to click the Menu icon on the toolbar to return to the Lesson listing, where you can select a new lesson.

Once you have started a course, you have the option to return to your last location in the course. To do so, click **Return to most recently accessed page of the course**.

To return to the course list in the Learning Center, click **Return to Course Information and Enrollment**.

2.9.4.2. Access a Self-Paced Course (SCORM Course)

Search for a SCORM Course using the same steps above for Online Courses and Seminars. The course launch page for a SCORM course has three buttons: Take Course, Review Course, and Browse Course.

When you click any of these buttons for a SCORM course, the Course Menu displays. A SCORM course menu can have a varying number of levels, called items.

Click on the information icon next to an item title for additional information about that part of the courseware. Click on the title of the item to start the courseware. When you are finished with an item of courseware, you will be returned to the Course Menu.

The different buttons have small differences between them:

- Take Course is the option most users want. It tracks your performance through the course and sets the lesson status according to your performance (completed, passed, failed, incomplete, not started).
- Browse Course is used when you want to preview the materials. It tracks your performance through the course and sets the lesson status to browsed.
- Review Course can be used once you have completed the course material. Like Take Course, it tracks your performance and sets the lesson status according to your progress.

2.9.4.3. Access a Self-Paced Course (Other Online Courses and Seminars)

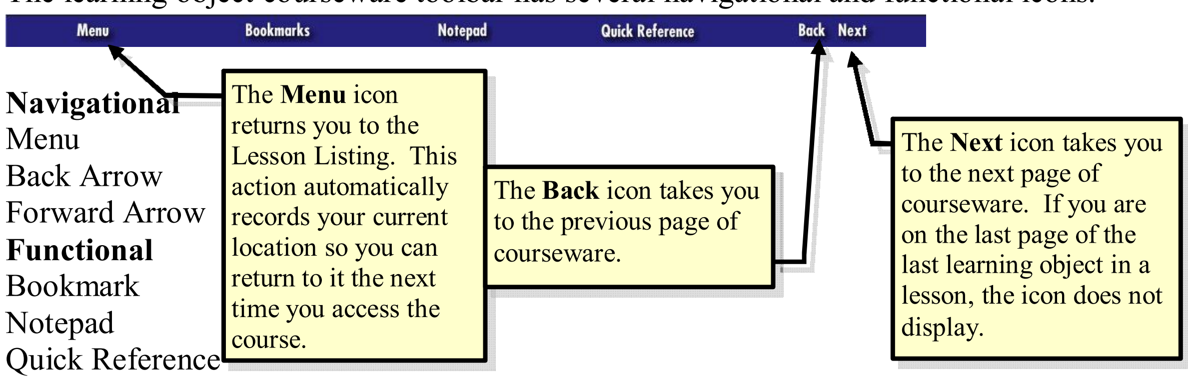
To ***Access*** a Self-Paced Course, perform the following steps:

1. Click the **Course Information & Enrollment** link or graphic icon.
2. Select a topic from the drop-down list box to view courses for that topic. Select All to return courses from all topics.
3. Enter a keyword to search or leave it blank to view all.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click [Search]. The results display below.
6. Click . Additional information displays on the right.
7. Click the Course Title link to display the course launch page, which includes the course synopsis and any special course requirements or information.
8. Click [Take Course] to start the course in a new window. To return to the course list in the Learning Center, click **Return to Course Information and Enrollment**.
9. After you have taken the course, click [Take Survey] to provide your opinions and comments (if applicable).

Note: *Online Courses and Seminars differ in look and navigation according to the provider.*

2.9.4.4. Courseware Toolbar / Navigation (Learning Object Course)

The learning object courseware toolbar has several navigational and functional icons.



See the following sections for Bookmark, Notepad, and Quick References.

2.9.4.4.1. Bookmark

The Bookmark link allows you to mark pages in the course that you want to refer to in the future. Pages bookmarked here are available in Course Bookmarks in the Learning Center.

To ***Add*** a Course Bookmark, perform the following steps:

1. Click the Bookmark icon on the Courseware toolbar. The Course Bookmark function displays in a new window.
2. Click **Add current page to course bookmarks**. A form displays.
3. Enter a name and comment for your bookmark.

4. Click Add to save the bookmark, ***or***
   Click Reset, to clear the information of all fields, ***or***
   Click Cancel to return to the bookmark list without saving the bookmark.

To change the order in which your bookmarks display, click one of the three text links:

- **Name** – Alphabetical by name
- **Create Date** – Date and time bookmark was saved, most recent first
- **Last Accessed** – Date and time bookmark was last visited, most recent first

To ***Access*** Course Bookmarks, click the Bookmark title link. The page associated with the selected bookmark will open in the courseware window.

To ***Edit*** Course Bookmarks, perform the following steps:

1. Click **Edit**. A new window opens that displays the bookmark form.
2. Make changes to name or comments as desired.
3. Click Update to save the changes, ***or***
   Click Reset to reset the form fields with their original information, ***or***
   Click Cancel to return to the bookmark list without deleting the bookmark.

To ***Delete*** Course Bookmarks, perform the following steps:

1. Click **Delete**. A confirmation dialog box appears.
2. Click OK to delete the bookmark, ***or***
   Click Cancel to return to the bookmark list without deleting the bookmark.

Note: There are two locations to access bookmarks: 1. Through the Course Bookmarks function in the Learning Center, and 2. In the course lesson listing through the Course Information and Enrollment function in the Learning Center.

2.9.4.4.2. Notepad

Notepad is the same tool available from the top toolbar. It is used for taking and referencing notes anywhere in the site, including courseware. A note added from the Notepad function on the course toolbar will automatically record the course you are in.

Clicking the Notepad icon opens a new window and displays an online note-taking tool that allows you to add, edit, delete, and read notes from anywhere in the site.

Clicking displays more information about the note.

Existing notes are automatically displayed when you access Notepad. You can change the order of the notes by clicking **Sort by Date** to display the most recent note first or by clicking **Sort by Name** to display notes sorted by subject line alphabetically.

When a new note is added to the learner's notepad, the site location and the current date are automatically saved as part of the note. This allows you to easily and quickly return to that location.
To ***Add*** a Note to Notepad, perform the following steps:

1. Click **Add new note**. The Add Note Content form displays in the right frame.
2. Enter a Subject title in the subject field.
3. Enter text in the Notes field.
4. Click Add.

To ***Edit*** Notepad notes, perform the following steps:

1. Click . The Notepad notes form with the current data displays.
2. Select the field for the item(s) you wish to edit.
3. Make edits to the appropriate fields.
4. Click Update to change the information.

To ***Delete*** Notepad notes, perform the following steps:

1. Click .
2. Click OK to confirm your choice to delete your notepad notes, ***or***
   Click Cancel to exit the function without deleting the notepad notes.

2.9.4.4.3. Quick References

Quick References contains links to Glossary Terms and References associated with the lesson that you are currently taking. These items are also available in the Glossary and Reference functions.

To ***Access*** Quick Reference, perform the following steps:

1. Click the Quick Reference Icon. The function displays in a new window.
2. Click the **references** link at the top of the page to see a list of associated references, ***or***
   Click the **terms** link to see a list of associated terms. The associated items will display below.
3. Click the title link of the item you want to see. The reference or term you selected displays on the right.

2.9.5. Curriculums

A curriculum is a series of courses grouped together and presented to you as a single entity. It can be either linear (forced order) or non-linear (recommended order). A linear progression means that you must take the courses in the prescribed order and you cannot access the next course until you have completed the previous course. A non-linear curriculum presents the courses in a recommended order, but you can take them in any order and simultaneously. When you have completed all courses in a curriculum, you are given credit for that curriculum.

To ***enroll*** in a curriculum:

1. Click the **Curriculum** link or graphic icon.
2. Select a topic from the drop-down list box to view curriculums for that topic. Select All to return curriculums from all topics.
3. Enter a keyword to search on or leave it blank to view all. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
4. Click Search. The results display below.
5. From the resulting list, click the Info icon next to the curriculum of your choice for additional information.

   If approval is required to access the curriculum, the following notice will occur:

   Enrollment in this curriculum requires approval. You will receive an email when you have been granted or denied access to this curriculum. Click the Request Access to Curriculum button to request enrollment in this curriculum
6. To request permission to access the curriculum, click the Request Access to Curriculum button.
7. If approval is not required, click **Enroll in Curriculum** to gain immediate access to the courses in the curriculum.

Once you have enrolled in the curriculum, it is added to your Transcript and your progress through courses it tracked through the curriculum as well as in the appropriate course section of the Transcript. Course availability will vary depending on whether the curriculum is linear or non-linear. If a course requires access approval, you will need to request and receive approval prior being able to take or enroll in the course. Also, you may be able to take courses through a curriculum that you are not available to you in Course Information and Enrollment.

Certain curriculums may have been set up by the curriculum owner/administrator to require approval prior to enrollment. When you review the curriculum information (by clicking the Info icon) for a curriculum that requires enrollment approval, the following message is displayed below the curriculum information:

Enrollment in this curriculum requires approval. You will receive an email when you have been granted or denied access to this curriculum. Click the Request Access to Curriculum button to request enrollment in this curriculum.

To request access to the course, click the Request Access to Curriculum button. A confirmation dialog box displays. Click OK to request access. An email is sent to the appropriate person advising them that you have requested permission to enroll in the curriculum, and the curriculum is added to the Approval Requests section of your Transcript. The history of the request process of detailed here, including request dates, actions, and explanations for access denial, if provided.

The authorized administrator can grant course access, deny access, or deny access with an explanation for the denial. In any case, you and your direct manager receive email notification of the authorization action and the Transcript is updated.

If approved, you can enroll in the curriculum and immediately have access to the courses.

If your request is rejected, you will receive an email confirming this action. If the authorized administrator provided a reason for the rejected request, this will also be included in the email. If you have questions regarding the status of your access request, please contact your administrator.

2.9.6. Notes & Assignments

The Notes and Assignments link provides information posted by the instructor for classroom courses. It includes scheduling information, assignments, additional references and resources, and instructor notes.

To ***Access*** Notes and Assignments, perform the following steps:

1. Click the **Notes & Assignments** link or graphic icon.
2. Click . Additional information about the course displays on the right.
3. Click the course name link to open a new window that displays the Notes and Assignments for the section of the course in which you are enrolled.

2.9.7. Software & Plug-ins

Software & Plug-ins features commonly used software and browser enhancing software known as plug-ins. It has information about each type of software, plus a link to the site to download the software. Note that the site does not require any additional software to run, but some content might.

To ***Access*** Software and Plug-ins, perform the following steps:

1. Click the **Software & Plug-ins** link or graphic icon.
2. Select a Topic from the drop-down list box to view software & plug-ins for that topic. Select All to return software & plug-ins from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click for more information on the Software or Plug-in.
7. Click the software title link to open a new window that displays the download site for the software. Follow the directions to download and install the software.

2.10. Lecture Hall

The Lecture Hall serves as both a place to conduct and view presentations and a collaborative effort for interaction among peers.

This building hosts the following functions:

- Audio & Video Presentations
- Collaborative Areas

2.10.1. Audio & Video Presentations

The Audio and Video Presentations link provides live and/or archived video and audio materials. These presentations are searchable by keyword, and presentation type. System and software requirements are available for review before running the presentation. The software requirements are available for download at the Book Store.

To ***View*** Audio & Video Presentations, perform the following steps:

1. Click the **Audio & Video Presentations** link or graphic icon.
2. Select a Topic from the drop-down list box to view audio and video presentations for that topic. Select All to return audio and video presentations from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 7.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Select the Audio option button, Video option button, or the both option button.
6. Click [Search]. The results display below. The presentation type is enclosed in [brackets] after the title.
7. Click . Additional information displays on the right.
8. Click the Presentation title link to open a new window that displays the audio or video presentation.

2.10.2. Collaborative Areas

Collaborative Areas provide real time communication in peer-to-peer and instructor-to-student settings through the use of chat rooms. Chat rooms are organized by topic and users can select a topic and join an already in-progress discussion of that topic.

This function hosts the sub function: Chat

2.10.2.1. Chat

Chat Rooms are virtual spaces for users to communicate in real-time. Organized into subjects, users select a chat topic and join an in-progress dialogue of other users currently in that Chat Room.

To ***Participate*** in a Chat, perform the following steps:

1. Click **Chat**.
2. Click a link to select a Chat Room Subject.
3. Click Enter Chat.
4. Type your comment(s) in the lower box of the Chat area.
5. Click Say, Whisper, Think, or Action. Icons explained at the top of the Chat area represent these commands.
6. Click Exit Chat when you are ready to leave the Chat area.

2.11. Library

The Library is the location for references, research materials, and links to information and learning resources.

This building hosts the following functions:

- FAQs
- Periodicals
- Quick Sites
- References
- Regulations & Policies
- Resources

2.11.1. FAQs

In the Library, you have the opportunity to access a list of Frequently Asked Questions (FAQs). This list is a compilation of common industry issues in the form of questions and responses. The questions are searchable by topics and/or keywords.

To ***Access*** FAQs, perform the following steps:

1. Click the **FAQs** link or graphic icon.
2. Select a Topic from the drop-down list box to view FAQs for that topic. Select All to return FAQs from all topics.
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . The answer and the source of the answer displays on the right.

2.11.2. Periodicals

The Periodicals link provides information concerning magazines, newsletters, and newspapers. These are searchable and a summary is provided for quick assessment before the entire article is accessed.

To ***View*** Periodicals, perform the following steps:

1. Click the **Periodicals** link or graphic icon.
2. Select a Topic from the drop-down list box to view periodicals for that topic. Select All to return periodicals from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the article link to open a new window that displays the periodical.

2.11.3. Quick Sites

Quick Sites are shortcuts to key industry sites with a summary and a link to the site provided.

To ***Access*** Quick Sites, perform the following steps:

1. Click the **Quick Sites** link or graphic icon.
2. Select a Topic from the drop-down list box to view quick sites from that topic. Select All to return quick sites from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the title link to open a new window that displays that quick site.

2.11.4. References

References contain industry-specific files of various media that include information such as articles, surveys, and reports. These references are organized by topic, and include source, file type, media type information and a link to the site. They are also referenced in the online courses and are available when referred to in the courseware.

To ***View*** References, perform the following steps:

1. Click the **References** link or graphic icon.
2. Select a Topic from the drop-down list box to view references for that topic. Select All to return references from all topics.
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.

7. Click the title link to open a new window that displays the reference.

2.11.5. Regulations & Policies

The Regulations and Policies section of the library contains information regarding industry-specific standards and guidelines. This information is listed alphabetically with a description, source, author, and link to the document, allowing for quick reference by the user.

To ***Access*** Regulations & Policies, perform the following steps:

1. Click the **Regulations & Policies** link or graphic icon.
2. Select a Topic from the drop-down list box to view regulations & policies for that topic. Select All to return regulations & policies from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 6.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Click Search. The results display below.
6. Click . Additional information displays on the right.
7. Click the title link to open a new window that displays the regulation or policy.

2.11.6. Resources

The Resources section of the library holds pre-selected sources for online research that are grouped into specific categories including associations, government, education, and industry. Once a list is generated, a summary, as well as a link to the site, is displayed.

To ***View*** Resources, perform the following steps:

1. Click the **Resources** link or graphic icon.
2. Select a Topic from the drop-down list box to view resources for that topic. Select All to return resources from all topics. *(Note: topics may not be utilized in your site. Skip to step 3.)*
3. Enter a keyword to search on or leave it blank to view all. If there is no keyword textbox, results have automatically displayed below. Continue to step 7.
4. Select a Search Option (All Words, Any Words, Exact Phrase, or Boolean).
5. Select a category from the drop-down list box to search on (or leave All to view all).
6. Click Search. The results display below.
7. Click . Additional information displays on the right.
8. Click on the title link to open a new window that displays the article.

2.12. Teaming Center

The Teaming Center is a collaboration area for users across the organization. It contains Team Rooms, which are areas of the site where users with a common project / interest / goal can share documents, web sites, BBS forums, and presentations.

The following terms are used in relation to the Team Room functions:

- **Public Team Room –** A team room that is open for viewing, participation, and content input by all site users.
- **Moderated Team Room –** A team room that is open for viewing and participation by all site users. Content input is limited to those users identified as Contributors and Owners.
- **Private Team Room –** A team room that is open for viewing and participation by members. Content input is limited to those users identified as Contributors and Owners.
- **Member –** A Member is a user that can view content and participate in a team room. They cannot upload content. They have "read only" access.
- **Contributor –** A Contributor is a user that can view content and participate in a team room, as well as upload content. They have "read and write" access.
- **Team Room Owner –** A Team Room Owner is the Administrator of a Team Room. (There can be more than one – the original owner can add additional Team Room Owners.) Owners can add content and edit content entered by all Contributors.
- **Local Items –** Content uploaded to the Team Room by a Contributor. This content is not available in other locations of the site. Local Content includes: documents, web sites, and presentations.
- **Linked Items –** Site content linked to the Team Room by a Contributor or Team Room Owner. Linked content can only be modified by the content owner (or a Content team member).
- **Item Owner –** The person who originally uploaded or linked an item to the Team Room.

The Teaming Center houses two main functions: *Team Room Management* and *Team Rooms*. These are explained below.

Team Room Management

Team Room Management is where users create new Team Rooms and Team Room Owners can manage the rooms that they administer. Management includes updating the Team Room name, type, and description and granting users permission within the Team Room (either member, contributor, or team room owner). From Manage Team Rooms, Team Room Owners can:

- Administer an existing Team Room
- Close an open Team Room
- Edit information about an existing Team Room
- Manage permissions / users for a Team Room
- Open a closed Team Room

Team Rooms

The Team Rooms function is where users access the Team Rooms they have permissions to participate in. Users search for the Team Room by keyword. Moderated, Private and Private/Classroom Team Rooms are restricted: the Team Room Owner through permissions governs access and participation in these Rooms.

Within a team room, the following features allow users to communicate and share resources:

- BBS – Link to the Team Room forum in the BBS function
- Calendar – Post and share information about events within a Team Room
- Chat Room – Link to the Team Room subject in the Chat Room
- Content – Access to content currently available through the Team Room including:
  Documents – Documents uploaded for use by the team room
  Linked Content – Content existing in the Site linked to the Team Room for immediate access
  Presentations – Microsoft® PowerPoint® presentations uploaded and converted into HTML for access by the Team Room
  Web Sites – Web sites entered for use by the Team Room

2.12.1. Team Room Permission Descriptions

Access to the different types of Team Rooms is determined by the type of room (Private, Moderated, or Public) and the permissions associated with that room.

The sub sections below detail Team Room permissions.

Member

A Team Room Member has "read only" access to a Private Team Room. They can view any content items and participate in the Chat Room and BBS forum. They cannot add linked or local items to a Team Room. In addition, Members can:

- Access a Team Room
- Participate in Chat and BBS for a Team Room
- View Items in a Team Room

Contributor

A Contributor has "read and write" access to a Team Room. Users who enroll in an integrated classroom based team room are automatically granted Contributor permission to the team room. In addition to having all Member abilities, they can also upload and link local items to a Team Room. All Contributors can edit information about other uploaded items. However, only the Item Owner and the Team Room Owner can remove an item. In addition, Contributors can:

- Edit information about any local items uploaded by other Contributors
- Participate in Chat and BBS
- Remove local items and linked items they added to a Team Room
- Upload items to a Team Room
- View items in a Team Room

Team Room Owner

The Team Room Owner has all the abilities of a Contributor, plus the tools to administer the Team Room. They can edit and remove any local items, remove linked items, edit Team Room information, and manage user participation / access rights. The original Team Room Owner cannot be removed as an owner. Instructors and administrators who create classroom based courses are automatically made Owners of the classroom based team room. All Team Room Owners have the same rights. In addition, Owners can:

- Activate and Hide Team Rooms
- Add and remove Members, Contributors and other Team Room Owners
- Edit information about any local items uploaded by other Contributors
- Manage the Team Room information (name, description, logo, type)
- Open and Close Team Rooms
- Participate in Chat and BBS
- Remove any local or linked item added by any Contributor
- Remove local items and linked items they added to a Team Room
- Upload items to a Team Room
- View items in a Team Room

Details about these functions are presented in the sections below.

2.12.2. Team Room Management

Team Room Management allows you to create and manage Team Rooms, edit information about the Team Room, administer the membership of the team room, and make those team rooms open or closed. These functions are explained in detail in the sub sections below.

2.12.2.1. Create a Team Room

The **Create New Team Room** link enables users to create private, moderated, or public Team Rooms. The user that creates the Team Room automatically becomes the Team Room Owner.

To ***Create*** a Team Room, perform the following steps:

1. Click the **Create New Team Room** link.
2. Complete the Create Room form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Enter the name of the Team Room.
*Description	Enter the description of the Team Room.
*Keywords	Enter words and phrases used in searches for the Team Room; not shown to users.
*Room Type	Public, Moderated, Private.

3. Click [Submit] to create a team room, ***or***
   Click [Reset] to clear the information in all fields, ***or***
   Click [Cancel] to exit without creating a team room.
4. To ***Review*** your content:
   Proofread your data to make sure it is correct.

To ***Add*** a Team Room:

5. Click [Add] to make the content available in the site, **or**
   Click [Edit] to return to the Team Room Input form to make changes, ***or***
   Click [Cancel] to exit without adding a team room.

2.12.2.1.1. Add a Team Room Logo

To ***Add*** a logo to your Team Room, perform the following steps.

1. Click **Edit** for the team room you wish to add a logo. The Team Room Edit Input form appears.
2. Click the **Add Logo** link located at the bottom of the input form.
3. Enter a file name in the File text box, ***or***
   Click [Browse…] to search and navigate through directories to select a file.
4. Click [Upload Logo]. The file is copied to a content folder on your site's server.

Note: After a Team Room is created the ability to add a Team Room Logo is activated.

To ***Update*** a Team Room Logo, perform the following steps:

1. Click **Edit** for the team room for which you wish to update a logo. The Team Room Edit Input form appears.
2. Click **Update Logo** located at the bottom of the input form.
3. Enter a file name in the File text box, ***or***
   Click [Browse…] to search and navigate through directories to select a file.
4. Click [Upload Logo]. The file is copied to a content folder on your site's server and the old logo file is deleted from the content folder.

2.12.2.2. Close Team Rooms

In addition to creating Team Rooms, Team Room Owners can close and open rooms that they have created. A closed room is "hidden" – not visible or accessible to anyone in the site. Closing a Team Room may be useful to a Team Room owner who wants to add content and review content for the Team Room but does not want to make it available for use.

To ***Close*** a Team Room that you have created, perform the following steps:

1. Check the checkbox for the team room you wish to close, ***or***
   Check the Select All checkbox to close all team rooms.

2. Click Close Team Rooms. A confirmation message appears at the top of the page listing the team room(s) that you have closed.

2.12.2.3. Open Team Rooms

Open Team Rooms are visible to all users of the site and accessible to any registered user of the site (depending on their membership in the team room).

To ***Open*** a Team Room, perform the following steps:

1. Check the checkbox for the team room you wish to open, ***or***
   Check the Select All checkbox to select all team rooms to open.
2. Click Open Team Rooms. A confirmation message appears at the top of the page listing the team room(s) that you have opened.

2.12.2.4. Edit (Team Room)

To ***Edit*** a Team Room, perform the following steps:

1. Click **Edit** on the Team Room Management page for the team room you wish to edit. An Edit Team Room Input Content form appears.
2. Complete the Edit Team Room form by entering data in the fields as explained below.
   *All required fields are marked with an *asterisk.*

*Name	Enter the name of the Team Room.
*Description	Enter the description of the Team Room.
*Keywords	Enter words and phrases used in searches for the Team Room, not shown to users.
*Room Type	Public, Moderated, Private.
Logo	Browse directories to select a graphic file to upload. ***Note****: This field is only active after a team room has been created.*

3. Click Submit to save the changes, ***or***
   Click Reset to reset the form fields with their original information, ***or***
   Click Cancel to exit without editing your team room.

To ***Review*** your content changes:

4. Proofread your data to make sure it is correct.

To ***Add*** the updated Team Room:

5. Click Add to make the content available in the site, **or**
   Click Edit to return to the Input form to make changes, ***or***
   Click Cancel to discard all changes.

2.12.3. Administer (Team Room)

The Administer Function allows you to add and remove Team Room Owners, Contributors and Members and collectively email those groups.

To ***Administer*** a Team Room, perform the following steps:

Click **Administer** on the Team Room Management page for the team room you want to administer.

2.12.3.1. Team Room Owners

To ***Add*** an Owner to a Team Room, perform the following steps:

1. Click **Add Owners**.
2. Type in all or part of a first name or a last name in the text box.
3. Click [Search]. The results display below.
4. Click **User Info** to display more information about that user.

Select the user(s) that you want to make owners of your team room.

5. Click [Add]. The user(s) will be added to a list.
6. Click [Add Owners] once you have completed the list, ***or***
   Click [Cancel] to exit without adding an owner to your team room.

Note: Applies to Public, Moderated and Private Rooms only.

To ***Remove*** an Owner from a Team Room, perform the following steps:

1. From the Administer Team Room form, select the checkbox for each owner individually or click the Select All box to remove all.
2. Click **User Info** to display more information about that user.
3. Click [Remove Owners]. A confirmation message appears at the top of the Administer Team Room form.

2.12.3.2. Team Room Contributors

To ***Add*** a Contributor to a Team Room, perform the following steps:

1. Click **Add Contributors**.
2. Type in all or part of a first name or a last name in the text box.
3. Click [Search]. The results display below.
4. Click **User Info** to display more information about that user.
5. Select the user(s) that you want to make contributors of your team room.
6. Click [Add]. The user(s) will be added to a list.
7. Click [Add Contributors] once you have completed the list.

Note: Applies to Moderated and Private Rooms only.

To ***Remove*** a Contributor from a Team Room, perform the following steps:

1. From the Administer Team Room form, select the checkbox for each contributor individually or click the Select All box to remove all.
2. Click **User Info** to display more information about that user.
3. Click Remove Contributors. A confirmation message appears at the top of the Administer Team Room form.

2.12.3.3. Team Room Members

To ***Add*** a Member to a Team Room, perform the following steps:

1. Click **Add Members**.
2. Type in all or part of a first name or a last name in the text box.
3. Click Search. The results display below.
4. Click **User Info** to display more information about that user.
5. Select the user(s) that you want to make members of your team room.
6. Click Add. The user(s) will be added to a list.
7. Click Add Members once you have completed the list.

Note: Applies to Private Rooms only.

To ***Remove*** a Member from a Team Room, perform the following steps:

1. From the Administer Team Room form, select the checkbox for each member individually or click the Select All box to remove all.
2. Click **User Info** to display more information about that user.
3. Click Remove Members. A confirmation message appears at the top of the Administer Team Room form.

2.12.3.4. Email to Owners

The Email to Owners function allows you to send email to all users whom you have made owners of the Team Room. You can send Emails to Owners by performing the following steps:

1. Click **Email to Owners**. A new window opens to display the Send Email form.
2. Complete the Send Email form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

CC	Add recipients to be copied on the email message.
BCC	Add recipients to be blind copied on the email message. A BCC recipients name is hidden from other recipients of the email.
Subject:	Enter the Subject line of the email message.

Message:	Enter the message to the students.

3. Click Send. The email is sent to all owners (to the email address in their profile) and any other recipients you added in the optional fields. The Send Email form window automatically closes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending an email.

2.12.3.5. Email to Contributors

The Email to Contributors function allows you to send email to all users whom you have made Contributors of the Team Room. You can send Emails to Contributors by performing the following steps:

1. Click **Email to Contributors**. A new window opens to display the Send Email Form.
2. Complete the Send Email Form, by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

CC	Add recipients to be copied on the email message.
BCC	Add recipients to be blind copied on the email message. A BCC recipients name is hidden from other recipients of the email.
Subject:	Enter the Subject line of the email message.
Message:	Enter the message to the students.

3. Click Send. The email is sent to all contributors (to the email address in their profile) and any other recipients you added in the optional fields. The Send Email form window automatically closes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending an email.

Note: *Owners are automatically added to the Contributors group; Owners will receive all emails sent to the Contributors group.*

2.12.3.6. Email to Members

The Email to Members function allows you to send email to all users whom you have made members of the Team Room. You can send Emails to Members by performing the following steps:

1. Click **Email to Members**. A new window opens to display the Send Email form.
2. Complete the Send Email form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

CC	Add recipients to be copied on the email message.
BCC	Add recipients to be blind copied on the email message. A BCC recipients name is hidden from other recipients of the email.
Subject:	Enter the Subject line of the email message.

Message:	Enter the message to the students.

3. Click Send. The email is sent to all members (to the email address in their profile) and any other recipients you added in the optional fields. The Send Email form window automatically closes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending an email.

Note: *Owners and Contributors are automatically added to the Members group; Owners and Contributors will receive all emails sent to the Members group.*

2.12.4. Team Rooms

The Team Rooms function allows you to:

- Edit and maintain Web Sites entered for use by the Team Room
- Link Content existing in the site linked to the Team Room for immediate access
- Link to the Team Room forum in the BBS function
- Link to the Team Room subject in the Chat Room
- Post and share information about events and locations with the Team Room Calendar
- Upload Documents uploaded for use by the team room
- Upload Microsoft ® PowerPoint presentations ® (which are automatically converted into HTML) for access by the Team Room

Note: Access to and operation of Team Rooms content and functions depends on the type of team room and what user permissions have been designated by the team room owner(s).

Public Team Rooms

A Public Team Room is a team room that is open for viewing, participation, and content input by all site users.

Note: Accessible to all users, all users may contribute.

Moderated Team Rooms

A Moderated Team Room is a team room that is open for viewing and participation by all site users. Content input is limited to those users identified as Contributors and Owners.

Note: Accessible to all users, selected users may contribute content.

Private Team Rooms

Much like Public and Moderated Team Rooms, Private Team Rooms allow real-time communication through the use of chat rooms and bulletin board systems. Chat rooms are organized by topic and users can select a topic and join an already in-progress discussion of that topic. However, unlike Public Team Rooms, Private Team Rooms allow users to share information and collaborate on a more private level by confining access to only those users with permissions. Private Team Room Administrators may select other registered users as members of their Private Team Room(s).

Note: Restricted to selected users, some selected users may contribute content.

2.12.4.1. Team Room Home Page

The Team Room Home page is the starting point for accessing content in the Team Room. The title of the Team Room appears at the top of the page above the Team Logo (if one has been applied to Team Room Home page). Other information and options are displayed which further identify the Team Room.

Room Type	Describes the type of Team Room (whether Private, Moderated, or Public).
Description	Descriptive text about the team room.
Owner(s)	Identifies who owns the Team Room (applies to Private, Moderated, or Public Team Rooms). Click **User info** to open a new window with more information about that user. Click **Send email** to open an Email Input form to send email to that owner.
Current Contributors	Identifies selected members of the Team Room who are able to contribute content (applies to Moderated and Private Team Rooms).
Current Members	Identifies selected members of the Team Room (applies to Private Team Rooms).
Options	This function allows group emails to be sent to either All Owners, All Contributors, or All Members (as applicable).

In addition, the Team Room Home Page contains links to the following functions:

- Content
- Calendar
- BBS
- Chat

The following sections explain access to and operation of these functions.

2.12.4.2. Content

The Content displayed by category links to all content associated with the individual teaming room. The Content categories are:

- Documents
- Presentations
- Web sites
- Linked Content

It may be useful to know before you add content to your Team Room that any content that you do add to a team room can later be shared with users throughout the site. This is useful if you want to use your team room as a collaborative area for creating content and then release it to the entire site.

***Note**: Only Linked Content (which is site content linked to the Team Room Page) has the function* Add to Shortcuts*; Documents, Presentations, and Web sites for Team Rooms are only available in Team Rooms and cannot be added to Personal KC page shortcuts.*

The following sub sections explain access to and operation of the functions of the Team Room Content Page.

2.12.4.2.1. Documents

The Documents function is useful for posting and sharing important files with other Team Room users. Instead of distributing documents individually, posting files on one main page saves time so other users can retrieve these documents when they choose to do so.

To ***Add*** a document, perform the following steps:

1. Click **Add Document**. The Add Document Content form appears in the right frame.

Complete the Add Document Content form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Name of the document being posted.
*Description	Brief description of the document's components.
*Keywords	Key words helpful for performing searches (not viewed by users).
*File	The file name of the document being posted.
*Source	Enter the name of the content provider (person or group).

When finished filling out the form, click Add to post the document. The caption of the button will change to read "Please Wait" while your file uploads. A message appears at the top of the form confirming that the file has been uploaded and displaying the new file name for the document, as it is stored on the server.

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a document, perform the following steps:

1. Click to view specific information about the document.

Click the link of the document to be viewed. The document opens in a new window.
Note: Applies to all users of the Team Room. Documents that have been added as content to the Team Room can be accessed for viewing by any Team Room participant. Team room participants can, through the use of the document's window menu, print or save the document locally to their machine.

2.12.4.2.2. Presentations

Presentations are Microsoft® PowerPoint® slide shows that have been added as content to the Team Room for accessing and viewing by all Team Room participants.

To ***Add*** a Presentation, perform the following steps:

1. Click **Add Presentation**.
2. Complete the Add Presentations Content form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Name of the presentation being posted.
*Description	Brief description of the presentation's components.
*Keywords	Key words helpful for performing searches (not viewed by users).
*File	Name of the presentation being posted.
*Source	Enter the name of the content provider (person or group).

3. When you are finished completing the form, click Add to post the presentation.

A message appears at the top of the page: "Content was linked to Team Room and can now be viewed by all members of this team. Please note that your Microsoft® PowerPoint® Presentation was transformed into HTML format."

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a Presentation, perform the following steps:

1. From the Team Room Content page, click to view specific information about the presentation.
2. Click the link of the presentation to be viewed. The presentation displays in a new window.

Note: Applies to all users of the Team Room.

To ***Delete*** a Presentation, perform the following steps:

1. From the Team Room Content page, click next to the presentation you want to remove.
2. Click **Delete**. A confirmation message appears.
3. Click Ok to delete the presentation, ***or***
   Click Cancel to exit without deleting the presentation.

2.12.4.2.3. Web Sites

Web Sites are recent articles and Web sites addressing Team Room-related topics. Only Team Room participants can access these Web sites through links in the Team Room.

To ***Add*** a Web Site, perform the following steps:

1. Click **Add Web Site**. The Add Web Site Content form appears.
2. Complete the Add Web Site Content form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Name of the Web site.
*Description	Brief description of the Web site.
*Keywords	Key words helpful for performing searches (not viewed by users).
*URL	Enter the full web address. Start the URL with **http:**//, **https:**// or **ftp:**//.

3. When finished completing the form, click Add to post the web site.

A confirmation page appears with the message: "Web site was added to Team Room."

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a Web Site, perform the following steps:

1. Click to view specific information about the web site.

Click the link of the web site to open a new window to display the web site.

Note: Applies to all users of the Team Room.

2.12.4.2.4. Linked Content

Linked Content is any item of site content that has been linked to the Team Room and is therefore available for use by team room participants. Since the source of linked content is site content (unlike Team Room Documents, Presentations, and Web Sites), there is no upload or add function. Instead, it is necessary to search for existing content to add to the Team Room's linked content.

In order to search and select content to add to your team room, follow the directions in the following sub sections.
To ***Add*** Linked Content, perform the following steps:

1. Click **Add Linked Content**. A Search Content form opens on the right.
2. Enter a keyword to search for content. Click Search.
3. Click **View** to display more information about the content item in a new window.
4. Click the checkbox next to each content item you wish to add, ***or***
   Click the Select All checkbox to select all content items.
5. Click Link Content. A confirmation message will appear on the top right.

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a Linked Content item, perform the following steps:

1. Click to view specific information about the linked content item. The Content Type is displayed in [braces] to the right of the content link.
2. Click the link of the content item. The item displays in a new window.

Note: Applies to all users of the Team Room. Since the source of Linked Content is site content (unlike Team Room Documents, Presentations, and Web Sites) the *Add to My Shortcut Button* appears at the top of the information screen on the right.

2.12.4.3. Calendar

The Calendar tool allows you to interactively post and share information about events within your Team Room. Additionally, this function allows you to post events that you want to schedule and manage on the calendar while providing the additional functionality of informing attendees through email. The Calendar also has a provision for creating online agendas and follow-up meeting minutes. Other features include the ability to create Aliases, which are groups you can create to further direct the scheduling, meeting information through email and Outlook integration, which allows users the ability to save Outlook calendar events locally to Outlook calendars installed on their machines. For integrated classroom based team rooms, the team room calendar will display all scheduled class section events that are also visible on the class calendar.

In order to activate the Calendar, click **Calendar** on the Team Room Home Page (below Linked Content link). The Calendar appears with the current month displayed.

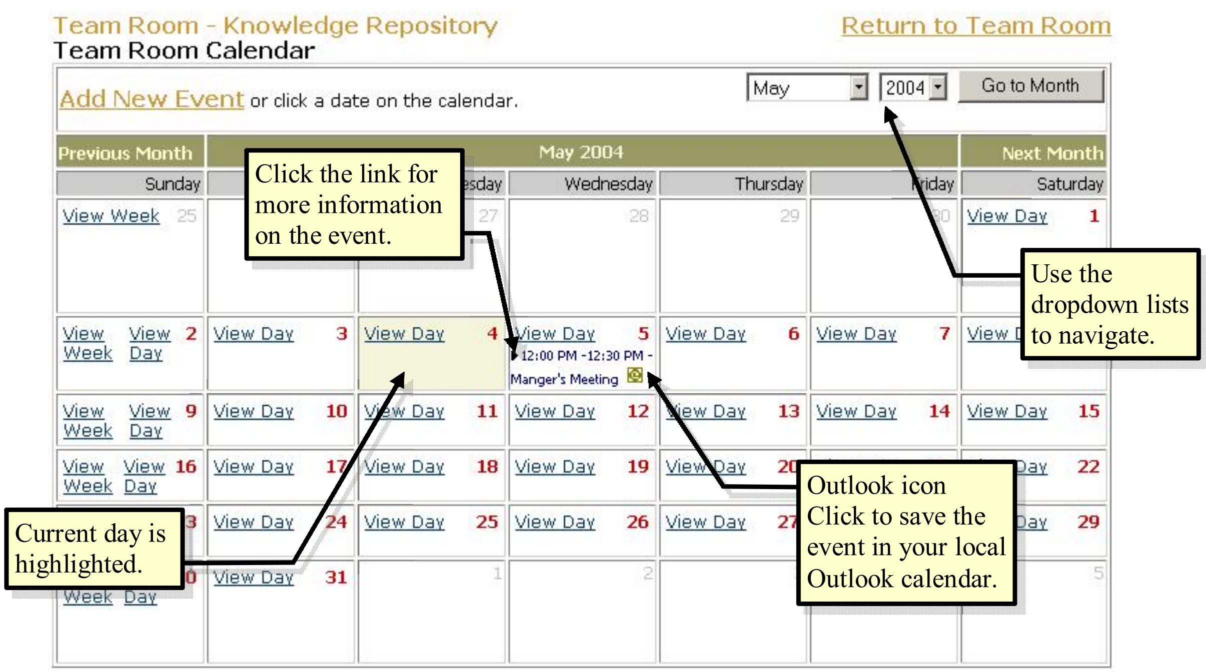


Figure 2-3 Team Room Calendar

The Calendar uses the familiar monthly format to display event titles on the date and time when they occur. Basic functions of the Calendar allow you to:

- Click the Number of the date to activate a Date Event Content form where you can create a new event (such as a meeting or a conference call and so forth).
- Click the event title within the calendar date to activate a content editing form to edit the details of that specific event (such as event tile, attendees, and so forth).
- Click the Prev Month icon to see the previous month.
- Click the Next Month icon to see the following month.
- Click on the Outlook icon in order to save the calendar event to your local machine.

2.12.4.3.1. Events

To ***Add*** an Event, perform the following steps:

1. Click **Add New Event** on the Team Room Calendar (Figure 2-3). The Add Event Content form (Figure 2-4) displays in the left frame.
2. Complete the form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*Event Title	Enter a title for your event.
Event Summary	Enter a summary for your event.
*Date	Enter a date (Enter date as mm/dd/yyyy), ***or*** Click to activate the calendar control. The calendar displays in a separate frame.
*Times	Enter a start time for your event (if you have a start time you must enter an end time, or select No Specific Time).
*No Specific Time	Required if no specific times are selected above.
Recurrence	Select Daily, Bi-Weekly, Monthly and so forth from the drop down list box.
End Date	Leave blank if it is the same as Date.
*Event Type	Select a type from the drop-down list box.
Location	Enter a location for your event.
Highlight event	Select if you want this event to be highlighted on the calendar.

3. Click [Add This Event] to add the event to the calendar, ***or***
   Click [Reset] to clear the information in all fields, ***or***
   Click [Cancel] to exit without adding the event.

4. Click **Return to Calendar** to return to the calendar.

To ***Update*** an Event, perform the following steps:

1. From your team room calendar, click on the event you want to update.
2. Make edits to the appropriate fields.
3. Click Update This Event . A confirmation message appears.
4. Click Ok to send an email to the attendees with the changes, ***or***
   Click Cancel not to send the email and return to the Event Details Content form.

To ***Delete*** an Event, perform the following steps:

From your team room calendar, click the event you want to remove.

1. Click Delete. A confirmation message appears at the top of the screen.
2. Click Continue to delete the event, ***or***
   Click Cancel and Return to exit without deleting the event.

Figure 2-4 Adding Events to the Team Room Calendar

2.12.4.4. Team Room Calendar Administration Console

The Administration Console function is available after you have created events. This allows you to:
Create and Maintain Attendee Groups (for meetings and other group events) and Alias Groups
Create and Maintain Agenda Items
Create and Maintain Action Items
Create, Maintain, and Distribute Meeting Minutes
Create and Send emails (to Alias Groups and Event Attendees)

2.12.4.5. Add an Attendee Alias Group

An Alias is an event group you can create to classify email recipients. The advantage to creating an Alias is that you can create multiple mail lists for each event whose participants you would like to inform by email. For example, if you have regular project meetings, you can create an alias (mailing group) for that project. If you have multiple projects, you can create a different alias for each project you would like to manage and schedule. In this way, you can add members to each alias once and then re-use the alias group as needed.

To ***Add*** an Alias group, perform the following steps:

1. Click **Attendees**. The Attendees Content form displays in the bottom, right frame.
2. Click **Create New Group**.
3. Enter a name for your group in the text field.
4. Click Create Group.

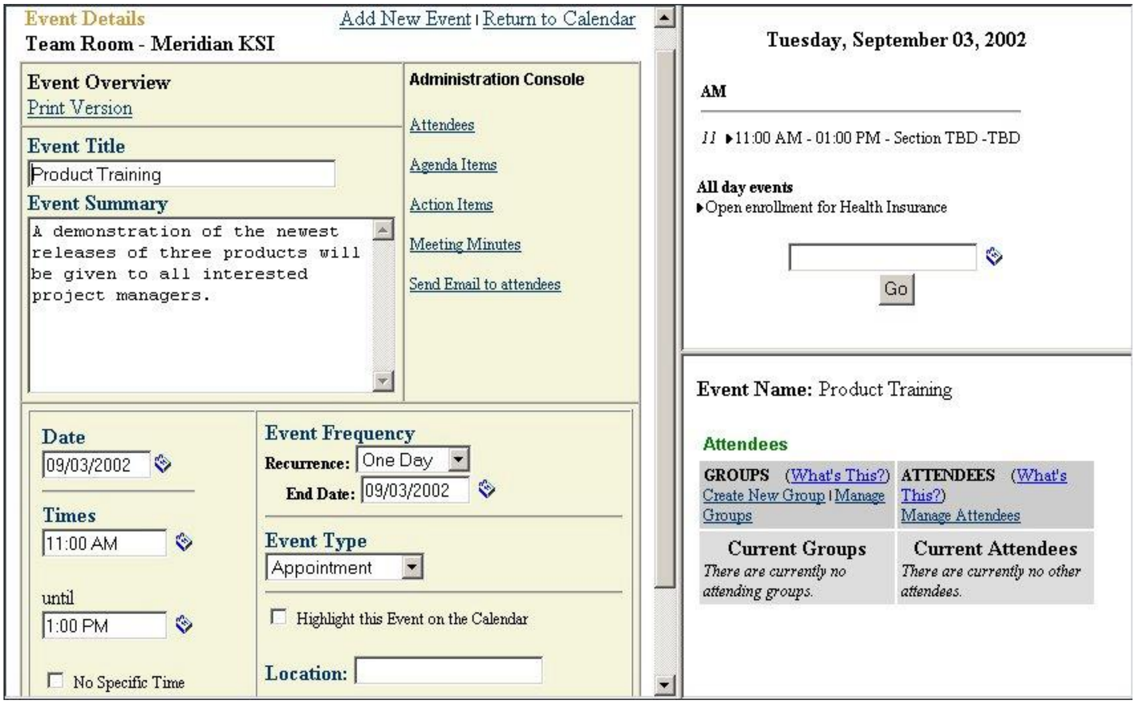


Figure 2-5: Create Group

A confirmation message appears: “The group [group name] was created.”

2.12.4.6. Add Members to an Alias Group

To ***Add*** a Member to an Alias group, perform the following steps:

1. Click **Edit** next to the name of the group you want to add members to.
2. Type in all or part of a last name in the text box.
3. Select an option button (either All Users or Team Room Owners).
4. Click Search. A list of users displays in the frame below.
5. Select the user(s) you want to make members of the alias group.
6. Click Add. The user(s) will be added to the alias group.

2.12.4.7. Delete Members from an Alias Group

To ***Delete*** a Member from an Alias group, perform the following steps:

1. From the Attendees Content form, click **Manage Groups**.
2. Click **Edit** next to the alias group you want to remove members from.
3. Select the checkbox for each member you want to remove.
4. Click **User Info** to display more information about that user.
5. Click Remove.

2.12.4.8. Add an Alias Group to an Event

To ***Add*** an Alias Group to an event, perform the following steps:

1. From the Attendees Content form, click **Manage Groups**.
2. Select the checkbox for each group you want to add to this event.
3. Click Add Groups. The group name should appear in the Current Groups section.

2.12.4.9. Delete an Alias Group from an Event

To ***Delete*** an Alias Group from an event, perform the following steps:

1. From the Attendees Content form, click **Manage Groups**.
2. Select the checkbox for each group you want to remove.
3. Click Remove Groups. The group name(s) should not be listed in the Current Groups section.

2.12.4.10. Agenda Items

To ***Add*** an Agenda Item, perform the following steps:

1. Click **Add a new Agenda Item**. The Agenda Content form displays in the bottom, right frame.
2. Enter text in the Agenda Item field.
3. Select a number for the priority value from the drop-down list box.
4. Click Add to add the agenda item, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without adding the agenda item.

To ***Edit*** an Agenda Item, perform the following steps:

1. Click next to the agenda item you want to edit. The Edit Agenda Item form displays.
2. Make edits to the appropriate fields.
3. Click Add to change the information.

To ***Delete*** an Agenda Item, perform the following steps:

1. Click next to the agenda item you want to remove.
2. A confirmation message appears.
3. Click Continue to delete the agenda item, ***or***
   Click Cancel and Return to exit without deleting the agenda item.

2.12.4.11. Action Items

To ***Add*** an Action Item, perform the following steps:

1. Click **Action Items**. The Action Items form displays in the bottom, right frame.

2. Click **Add a new Action Item** to add a new action item to that event. The Edit Action Items Content form displays in the bottom, right frame, ***or***
   Click **Import Agenda Items** to use existing agenda items as an action item. The Action Items Import form appears in the bottom, right frame.
3. Enter text in the Action Items field.
4. Select a number for the priority value from the drop-down list box.
5. Select Highlight this Item to display this item highlighted, ***or***
   Leave un-checked to not highlight this item.
6. Enter a due date (Enter date as mm/dd/yyyy), ***or***
   Click to activate the calendar control. The calendar displays in a separate frame.
7. Select the **Complete** check box to display this item as completed, ***or***
   Leave un-checked if it is not yet completed.
8. Click Add to add the action item.
   Click Reset to clear the information in all fields.
   Click Cancel to exit without adding the action item.

Note: *You cannot delete an action item that has child items associated with it.*

To ***Delete*** an Action Item, perform the following steps:

1. Click next to the action item you want to remove. A confirmation message appears.
2. Click Continue to delete the action item, ***or***
   Click Cancel and Return to exit without deleting the action item.

To ***Edit*** an Action Item, perform the following steps:

1. Click next to the action item you want to remove. The edit Action Item form appears.
2. Make edits to the appropriate fields.
3. Click Add to update the action item, ***or***
   Click Reset to reset the fields with the original information, ***or***
   Click Cancel to exit without editing the action item.

Note: Once you have created an Action Item, the option to assign a person to that action item is available to you.

To ***Assign*** an Action Item, perform the following steps:

4. Select the option button next to the name of the person you want to assign the action item to.
5. Click Assign to assign the action item, ***or***
   Click Reset to reset the option buttons, ***or***
   Click Cancel to exit without assigning the action item.

To ***Change*** an Action Item assignment, perform the following steps:
1. Click next to the action item assignment you want to change.

2. Select the option button next to the name of the person you want to change the assignment to.
3. Click Assign to assign the action item, ***or***
   Click Reset to reset the option button to the previous assigned person, ***or***
   Click Cancel to exit without changing the action item assignment.

Note: You must add Attendees to your event to be able to assign Action Items.

2.12.4.12. Meeting Minutes

To ***Add*** Meeting Minutes, perform the following steps:

1. Click **Meeting Minutes**. The Meeting Minutes Content form displays in the bottom, right frame.
2. Click **Add a new Meeting Minutes Item** to add a new meeting minutes item to that event. The Meeting Minutes Items Content form displays in the bottom, right frame.
3. Enter text in the Meeting Minutes Items field.
4. Select a number for the priority value from the drop-down list box.
5. Click the Highlight this Item check box to display this item as highlighted, or Leave un-checked to not highlight this item.
6. Select a parent for this item from the list of available parent items.
7. Click Add to add meeting minutes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without adding meeting minutes.

1. To Edit Meeting Minutes, perform the following steps:
2. Click . The Edit Meeting Minutes form appears.
3. Make edits to the appropriate fields.
4. Click Add to change the information.

To ***Delete*** Meeting Minutes, perform the following steps:

1. Click next to the meeting minutes item you want to remove. A confirmation message appears.
2. Click Continue to delete the meeting minutes item, ***or***
   Click Cancel and Return to exit without editing the meeting minutes.

2.12.4.13. Send Email to Attendees

To ***Send*** an email to the Attendees, perform the following steps:

1. Click **Send Email to Attendees**.
2. Click Ok to send the email to everyone on the attendees list. A copy of the email displays in the top, right frame, ***or***
   Click Cancel to exit without sending the email.

2.12.4.14. Bulletin Board System (BBS)

The Bulletin Board System (BBS) allows users to post messages. Other users are able to read these messages and respond directly to them.

To enter the Bulletin Board System, click **BBS**.

To ***Create*** a new message, perform the following steps:

1. Click the Start a New Thread icon.
2. Enter the subject of the new message in the Subject text box.
3. Enter the message in the Message text box.
4. Click [Post] to publish the message, ***or***
   Click [Cancel] to exit without posting a message.

To ***Read*** messages, perform the following steps:

1. Click which message to read under the name of the Team Room.
2. Click on different messages to continue reading posted topics.

To ***Reply*** to a message, perform the following steps:

1. Click which message to reply to. The message will be highlighted in red.
2. Click the Reply icon.
3. Type your message.
4. Click [Reply] to publish the message, ***or***
   Click [Cancel] to exit without posting a message.

2.12.4.15. Chat

Chat Rooms are virtual spaces for users to communicate in real-time. Organized into subjects, users select a chat topic and join an in-progress dialogue of other users currently in that Chat Room.

To ***Participate*** in a Chat, perform the following steps:

1. Click **Chat**.
2. Type your comment in the lower text box of the chat area.
3. Click Say, Whisper, Think, or Action. Icons explained at the top of the chat area represent these commands.
4. Click [Exit Chat] when you are ready to exit the chat area, ***or***
   Click [Enter Chat] if you are disconnected from the chat area and want to re-enter chat, ***or***
   Click [Cancel] to exit the chat area.

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